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PERSONAL PAPERLESS DOCUMENT MANAGER v2 SUPPORT DOCUMENTATION

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Personal Paperless Document Manager v2

Getting Started Guide

Getting started with Personal Paperless Document Manager v2

Personal Paperless Document Manager v2 consists of server-side and client-side components.

This document provides quick instructions for installing the client-side software associated with Personal Paperless Document Manager v2.

- PPDM Desktop Module 12 (desktop component; displayed on screen as PaperPort)
- PPDM OCR Module 17 (desktop component; displayed on screen as OmniPage)
- PPDM PDF Converter Module 7 (desktop component)
- DesktopDeliveryPSP 10 (desktop component)
- PPDM PSP Delivery Module 3 (server component; shipped on a separate CD)

Note:

Personal Paperless Document Manager v2 products, including PPDM Desktop Module, PPDM OCR Module, PPDM PDF Converter Module, DesktopDeliveryPSP and PPDM PSP Delivery Module (with device clients) are translated into English, French, Italian, German, Spanish, and Brazilian Portuguese. These products are designed to work with an operating system that is properly configured with the corresponding language. Use of these products with operating systems that are configured with non-supported languages is not recommended or supported.

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Product documentation

Personal Paperless Document Manager v2 is shipped with the following documentation:

- **Getting Started Guide**: this guide. Consult it for product overview and installation information.
- **DesktopDeliveryPSP Guide**: this is a separate PDF (located at the `PPDMDesktopDelivery` folder on the desktop disk). It contains information on DesktopDeliveryPSP usage.
- **Server Administrator's Guide**: this PDF can be found in the `DOCS` folder on the server disk. Consult it for comprehensive technical information as well as for the administrator installation of the server component.

Installing Personal Paperless Document Manager v2

To install the desktop-side components of Personal Paperless Document Manager v2, you need Administrator rights on the target computer. For instructions on how to install the server-side components, refer to the **Server Administrators Guide** located on the server CD.

The installation disk contains multiple localized versions of the associated software. To begin, select the language appropriate for your installation. This displays a second dialog box that enables you to **Start installation** or **Browse CD**.

Before starting installation, you can specify which components you want to install. Components previously installed from the disk are marked with a green checkmark on the right. Then specify a common installation directory for all components.

In the next screen, you must accept the License Agreement to proceed with the installation.

Note:

If you install DesktopDeliveryPSP as part of the above procedure the program behavior will still need to be configured through the **DesktopDeliveryPSP Settings** dialog for proper functioning. Alternatively, you can configure the application at install-time. To do so, exclude DesktopDeliveryPSP installation from the above procedure (unmark its checkbox) and install it separately with command-line parameters. For detailed guidelines, see the **DesktopDeliveryPSP** documentation in the **PPDMDesktopDeliveryPSP** folder on the disk.

A Personal Paperless Document Manager v2 silent install launches installing each desktop component without user intervention. Users are informed of installation progress by progress monitor and application screens. PDF Converter Module will be installed automatically if you install either Desktop Module or OCR Module.

You will need to remove Nuance and ScanSoft PDF Products, as well as PaperPort and OmniPage before Personal Paperless Document Manager v2 can be installed.

Note:

On some systems, before the setup program continues with component installation, a Windows Installer program launches to update necessary system files. After these files are installed, a message appears instructing you to reboot your system. When Windows restarts, the installation automatically continues.

Finishing the installation

As the final step of the installation, the product gets activated silently, provided that the serial number has been entered precisely.

After the installation, DesktopDeliveryPSP is inactive and you must configure it for proper functioning. Right-click on its icon in the system tray and choose the **Settings** command. The DesktopDeliveryPSP Settings dialog appears. Use this to configure the program. DesktopDeliveryPSP is designed to monitor

- a specified folder on a networked file server or local drive for incoming scanned images and/or
- an email inbox and/or
- Multifunction Printers/Copiers using the PSP Server for Personalized MFP Scanning functionality.

Refer to the **DesktopDeliveryPSP PDF** document (available from the Start Menu, under **(All) Programs > PPDM > Desktop Module 12**), for information about setting up and using DesktopDeliveryPSP.

Uninstalling Personal Paperless Document Manager v2

To uninstall the desktop-side components of Personal Paperless Document Manager v2, you can use either of the following options:

- Use the uninstaller provided with the product (only available if the PPDM Desktop Module is installed). You can do this via the **Uninstall PPDM** link in the Start Menu, under **(All) Programs > PPDM**.
- Locate and remove the components via **Add/Remove Programs**, preferably in the following order:
    1. **DesktopDeliveryPSP**
    2. **PPDM Desktop Module**
    3. **PaperPort Image Printer**
    4. **RSSolo**
    5. **PPDM OCR Module**
    6. **PPDM PDF Converter Module**

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Welcome

Welcome and thank you for choosing our software. This document will give you guidance on how to install the product. It covers the following areas:

- System Requirements
- Setting up Network Environment
- Interactive Installation
- Setting up the Personal Paperless Document Manager v2 (abbreviated as PPDM) application with the Administration Tool
- Customized installation (advanced)
- Installer command-line parameters
- Troubleshooting tips

This Guide shows screenshots made under Microsoft® Windows® 7. The appearance may vary under other Operating Systems.

System Requirements

To install the software, your system has to meet the following requirements:

- Operating system: Microsoft® Windows® XP Professional SP3 (32-bit), Microsoft® Windows® 2003 Server SP2 (32-bit or 64-bit), Microsoft® Windows® 2008 Server SP2 (32-bit or 64-bit) or Microsoft® Windows® 7 (32-bit or 64-bit).
- Microsoft Internet Information Services (IIS) 5.1, 6.0, 7.0 (only on Microsoft® Windows® 2008 Server), or 7.5 (only on Microsoft® Window® 7), installed with "World Wide Web Services".
- Microsoft® Internet Explorer 7.0 or later.
- Java Runtime Environment™ (JRE) version 1.5 or later.

The following prerequisite is offered during installation:

- Microsoft® .NET Framework version 2.0 Service Pack 1.

Installing Prerequisites

Availability of system prerequisites:

- Microsoft® Internet Information Services (IIS) 5.1, or 6.0 is available from the Microsoft® Windows® installation CD.
- Microsoft® Internet Explorer 7.0 or later.
- Microsoft® .NET Framework version 2.0 SP1 is available in the prerequisites folder of PPDM PSP Delivery Module 3 installation package or from Windows Update.
- Java™ Runtime Environment (JRE) version 1.5 or later is available in the prerequisites folder of PPDM PSP Delivery Module 3 installation package (JRE 1.6.21) or from http://java.sun.com/javase/downloads.

Install prerequisites as instructed in the documentation of the individual components.

Notes:

- Microsoft® Windows® XP Home Edition is not supported, because Microsoft® Internet Information Services is not a part of this operating system.
- If IIS is installed after the .NET 2.0 Framework installation, the framework registration into IIS might not be performed correctly. See the troubleshooting tips on how to fix this problem.
- We recommend checking that IIS is installed and working properly before starting the customized installation of PPDM PSP Delivery Module 3. For interactive installation, IIS is a prerequisite.

Pre-Installation Device Configuration

We recommend that you use a static IP address for the device. Descriptions in this guide are based on such a scenario.

Before installing and using PPDM PSP Delivery Module 3 you need to make sure that Embedded Software Architecture (ESA) also known as Java™ Platform are installed on the device. This is included in the firmware of some Ricoh devices (no separate installation is required). Other devices do require the installation of Embedded Software Architecture. For details consult your device documentation. For more detailed instructions check the Embedded Software Architecture Installation Manual.

Ricoh SDK/J 2.xx devices which do not conform to SDK/J version 2.09 or later will require an SD card upgrade to support remote software installation and configuration. Contact your Ricoh representative to obtain a device upgrade if needed.

Note:

If the IP address of a device changes, re-register the device in the PPDM server using the Admin Tool.

Setting up the Network Environment

To utilize the full functionality of the product, you have to identify a file server in your network that is accessible via SMB. (This file server can also be used as a PPDM PSP Delivery Module 3 server).

We recommend that you install the product to a server with a static IP address. The following description is based on such a scenario.

Note:

If the IP address of the server is changed, you have to change it in the PPDM PSP Delivery Module 3 also (see section "Changing server IP address after setup"). Additionally, all devices should be re-registered in the PPDM server using the Admin Tool to update the new IP address.

The configuration steps presented here describe the Windows, IIS and SMB based process. If you are using the product on a different system, consult your product distributor.

IP Addresses and Host Names

PPDM PSP Delivery Module 3 supports IP addresses as well as host names. In general, you are free to use either for identifying the device, server, etc. However, there are cases when host names cannot be properly resolved (e.g. clients, the server, the device(s) are in different workgroups, etc). In such scenarios use IP addresses when:

- Installing the server.
- Accessing the Administration Tool.
- Setting the repository parameters in the Administration Tool.
- Specifying the Server in DesktopDeliveryPSP.

Configuring IIS on Windows 2008 Server (2003 Server is similar)

The following describes how to configure IIS on Windows 2008 Server. For 2003 Server see Microsoft's web site.

1. Click **Start** > **Server Manager**.
2. Under the Server Manager root node click **Role** .
3. Under **Roles Summary** click **Add Role**.
4. In the Add Roles Wizard choose the **Select Server Roles** page.
5. Click Web Server (IIS) and accept all required features.
6. Click **Next** twice.
7. On the **Select Role Services** page click **ASP.NET** under Application Development and accept all required role services.
8. On the same page select **Windows Authentication** under **Security**.
9. Select **IIS 6 Metabase Compatibility** under **IIS 6 Management Compatibility**.
10. Click **Next**.

11. Click **Install**.
12. When the installation completes click **Close** to close the Wizard.

On Windows Server 2008 64-bit systems, the default option should be used for 32-bit enablement. To do this perform the following steps:

1. Choose **Control Panel > Administrative Tools > Internet Information Services (IIS) Manager** from the Start Menu.
2. Select the default application pool (usually `<COMPUTER>/Application Pools/DefaultAppPool`).
3. Right-click the default application pool and select **Advanced Settings…**.
4. Set the **Enable 32-Bit Applications** option to **False**.
5. Press **OK**.

Configuring IIS on Windows 7 (Windows XP is similar.)

The following describe the steps to install and configure IIS on Win 7. For Windows XP, refer to Microsoft's web site.

1. To open the **Windows Features** dialog box, click **Start**, and then click **Control Panel**.
2. In the **Control Panel**, click **Programs** (**Programs and Features** in Classic View).
3. Click **Turn Windows features on and off**.
4. You may receive the Windows Security warning. Click **Allow** to continue.
5. Select **Internet Information Services** to choose the default features for installation.
6. Expand **Internet Information Services**. Additional categories of IIS features are displayed.
7. Select **IIS 6 Metabase Compatibility** under **Web Management Tools\IIS 6 Management Compatibility**.
8. Select **Windows Authentication** under **World Wide Web Service\Security**.
9. Click **OK** to install features.
10. The progress indicator appears.
11. When the installation completes, the **Windows Features** dialog box closes, and the **Control Panel** is displayed (**Programs and Features** in Classic View).

On Windows 7 64-bit systems, the default option should be used for 32-bit enablement. To do this, perform the following steps:

1. Choose **Control Panel > Administrative Tools > Internet Information Services (IIS) Manager** from the Start Menu.
2. Select the default application pool (usually `<COMPUTER>/Application Pools/DefaultAppPool`).
3. Right-click the default application pool and select **Advanced Settings…** .
4. Set the **Enable 32-Bit Applications** option to **False**.
5. Press **OK**.

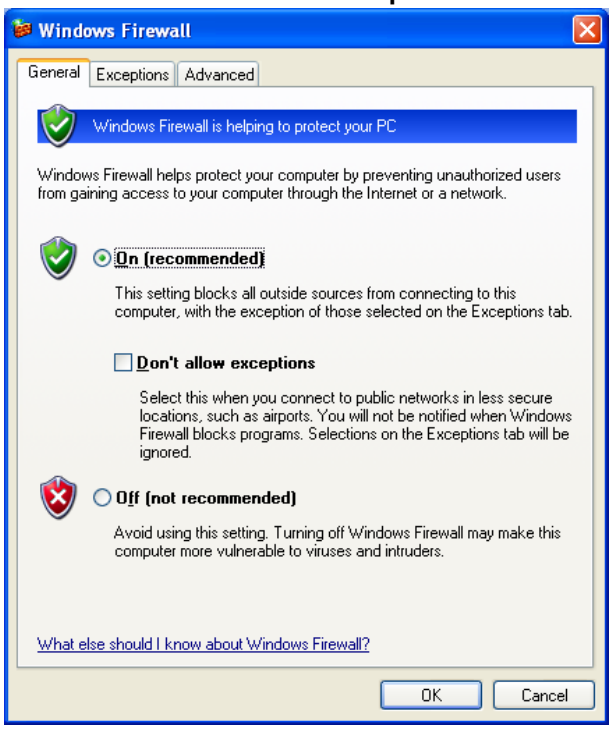
Firewall settings

The following sections contain instructions on how to configure the firewall on various Windows systems.

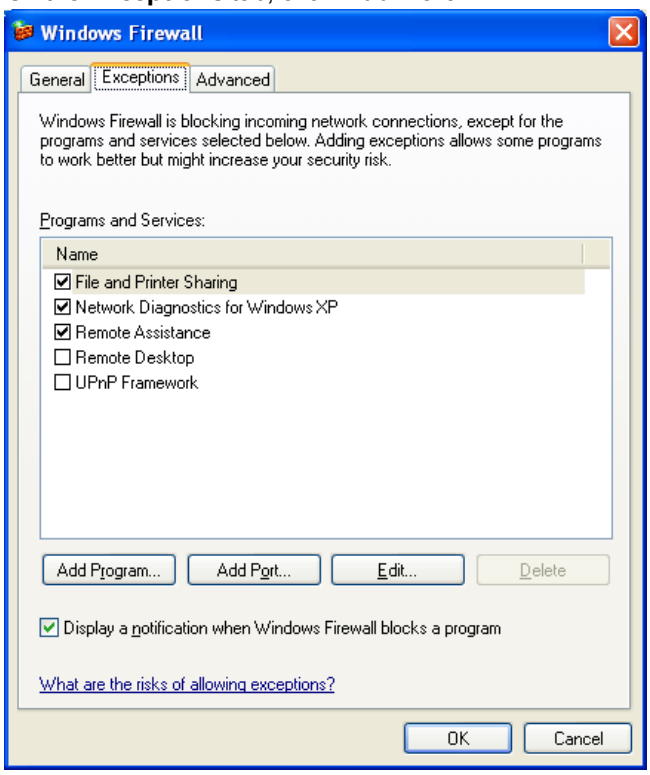
Firewall settings for Windows XP and Windows Server 2003

The following steps describe the necessary steps for configuring the firewall on Windows XP and Windows Server 2003:

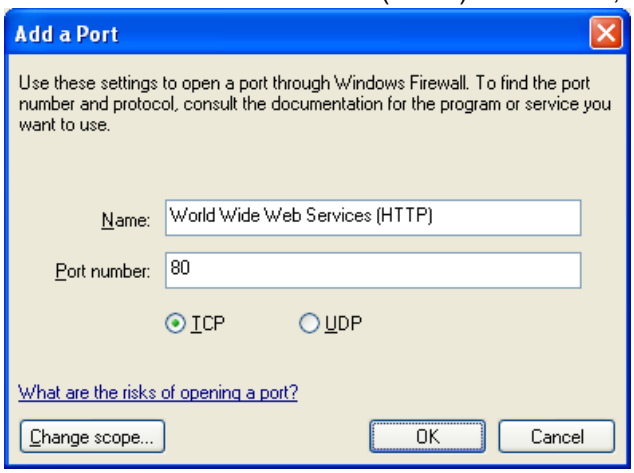
1. Click **Control Panel** > **Windows Firewall**.
2. Ensure that the **Don't allow exceptions** box is unchecked.


Windows Firewall
General
Exceptions
Advanced
Windows Firewall is helping to protect your PC
Windows Firewall helps protect your computer by preventing unauthorized users from gaining access to your computer through the Internet or a network.
On (recommended)
This setting blocks all outside sources from connecting to this computer, with the exception of those selected on the Exceptions tab.
Don't allow exceptions
Select this when you connect to public networks in less secure locations, such as airports. You will not be notified when Windows Firewall blocks programs. Selections on the Exceptions tab will be ignored.
Off (not recommended)
Avoid using this setting. Turning off Windows Firewall may make this computer more vulnerable to viruses and intruders.
What else should I know about Windows Firewall?
OK
Cancel

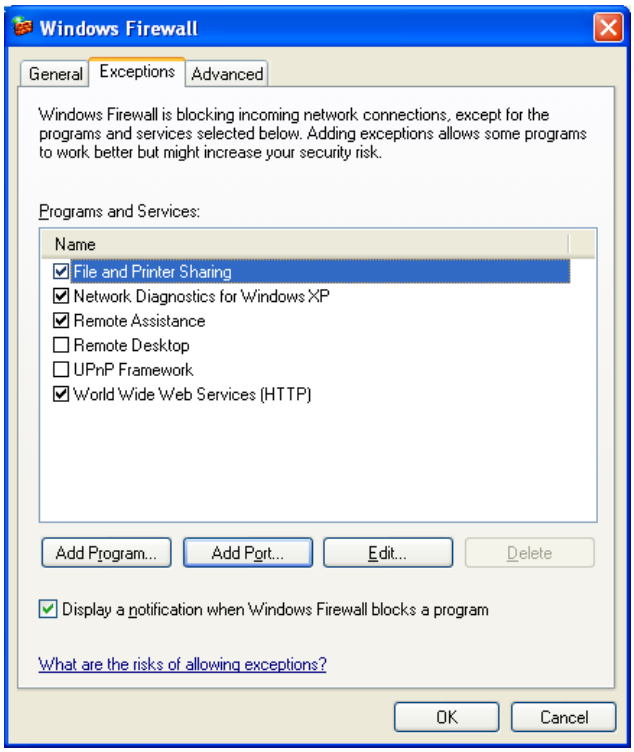
3. On the **Exceptions** tab, click **Add Port**.



4. Enter World Wide Web Services (HTTP) as the name, and 80 as the port number.


Add a Port
Use these settings to open a port through Windows Firewall. To find the port number and protocol, consult the documentation for the program or service you want to use.
Name:
World Wide Web Services (HTTP)
Port number:
80
TCP
UDP
What are the risks of opening a port?
Change scope...
OK
Cancel

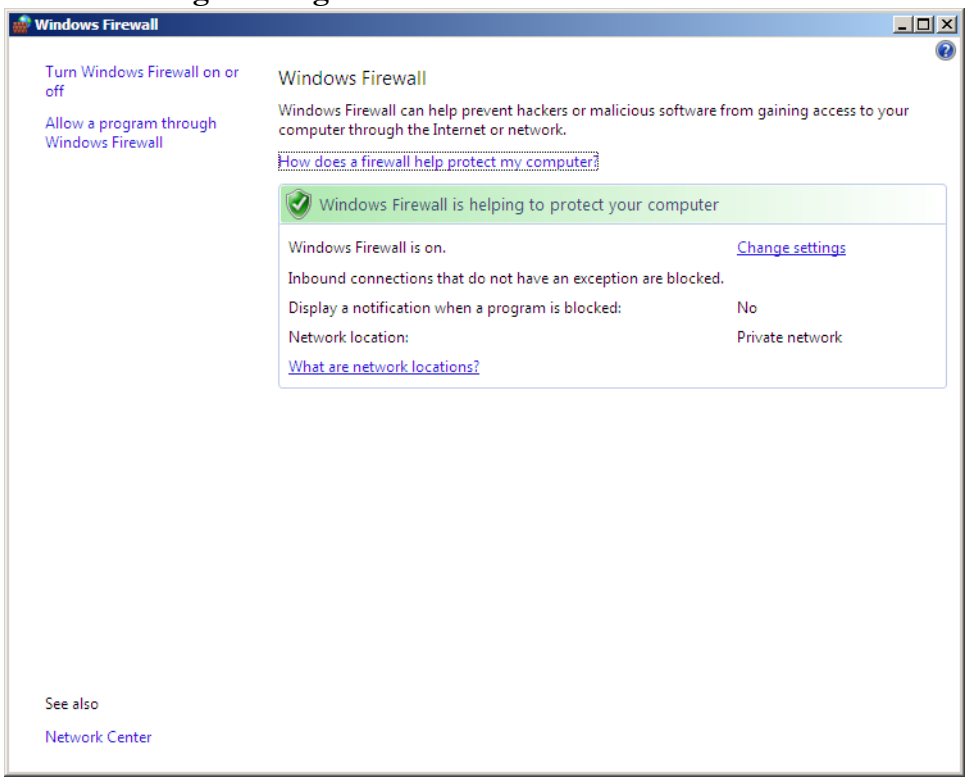
5. Click **OK**.



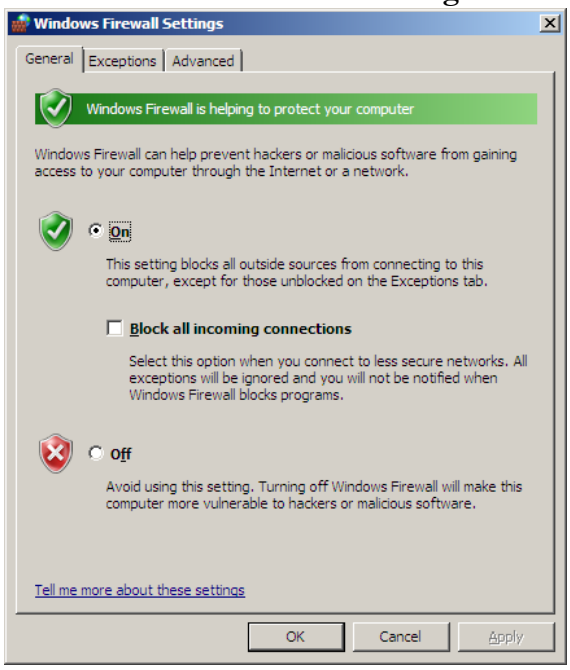
Firewall settings for Windows Server 2008

The following steps describe the necessary steps for configuring the firewall on Windows Server 2008:

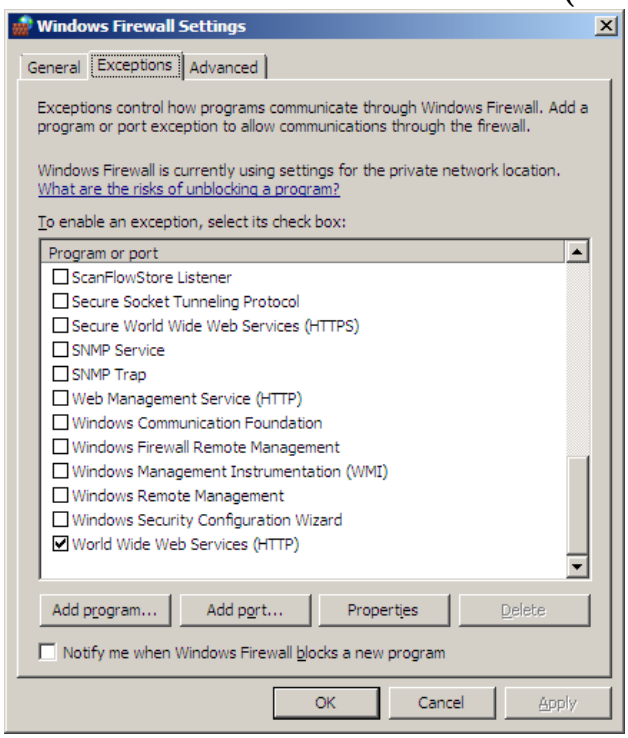
1. Click **Control Panel > Windows Firewall**.
2. Click on **Change Settings**.


Windows Firewall
Turn Windows Firewall on or off
Allow a program through Windows Firewall
Windows Firewall
Windows Firewall can help prevent hackers or malicious software from gaining access to your computer through the Internet or network.
How does a firewall help protect my computer?
Windows Firewall is helping to protect your computer
Windows Firewall is on.
Change settings
Inbound connections that do not have an exception are blocked.
Display a notification when a program is blocked:
No
Network location:
Private network
What are network locations?
See also
Network Center

3. Ensure that the **Block all incoming connections** setting is unchecked.


Windows Firewall Settings
General
Exceptions
Advanced
Windows Firewall is helping to protect your computer
Windows Firewall can help prevent hackers or malicious software from gaining access to your computer through the Internet or a network.
On
This setting blocks all outside sources from connecting to this computer, except for those unblocked on the Exceptions tab.
Block all incoming connections
Select this option when you connect to less secure networks. All exceptions will be ignored and you will not be notified when Windows Firewall blocks programs.
Off
Avoid using this setting. Turning off Windows Firewall will make this computer more vulnerable to hackers or malicious software.
Tell me more about these settings
OK
Cancel
Apply

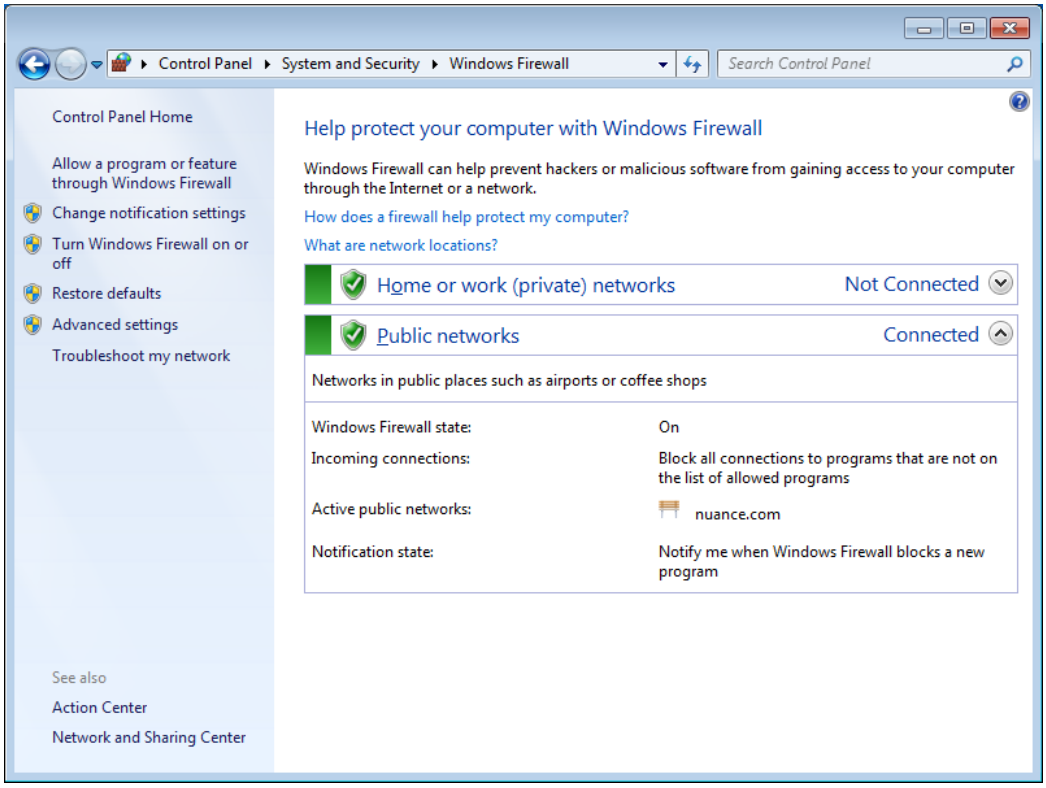
4. Ensure that the **World Wide Web Services (HTTP)** is checked under the **Exceptions** tab.


Windows Firewall Settings
General
Exceptions
Advanced
Exceptions control how programs communicate through Windows Firewall. Add a program or port exception to allow communications through the firewall.
Windows Firewall is currently using settings for the private network location.
What are the risks of unblocking a program?
To enable an exception, select its check box:
Program or port
ScanFlowStore Listener
Secure Socket Tunneling Protocol
Secure World Wide Web Services (HTTPS)
SNMP Service
SNMP Trap
Web Management Service (HTTP)
Windows Communication Foundation
Windows Firewall Remote Management
Windows Management Instrumentation (WMI)
Windows Remote Management
Windows Security Configuration Wizard
World Wide Web Services (HTTP)
Add program...
Add port...
Properties
Delete
Notify me when Windows Firewall blocks a new program
OK
Cancel
Apply

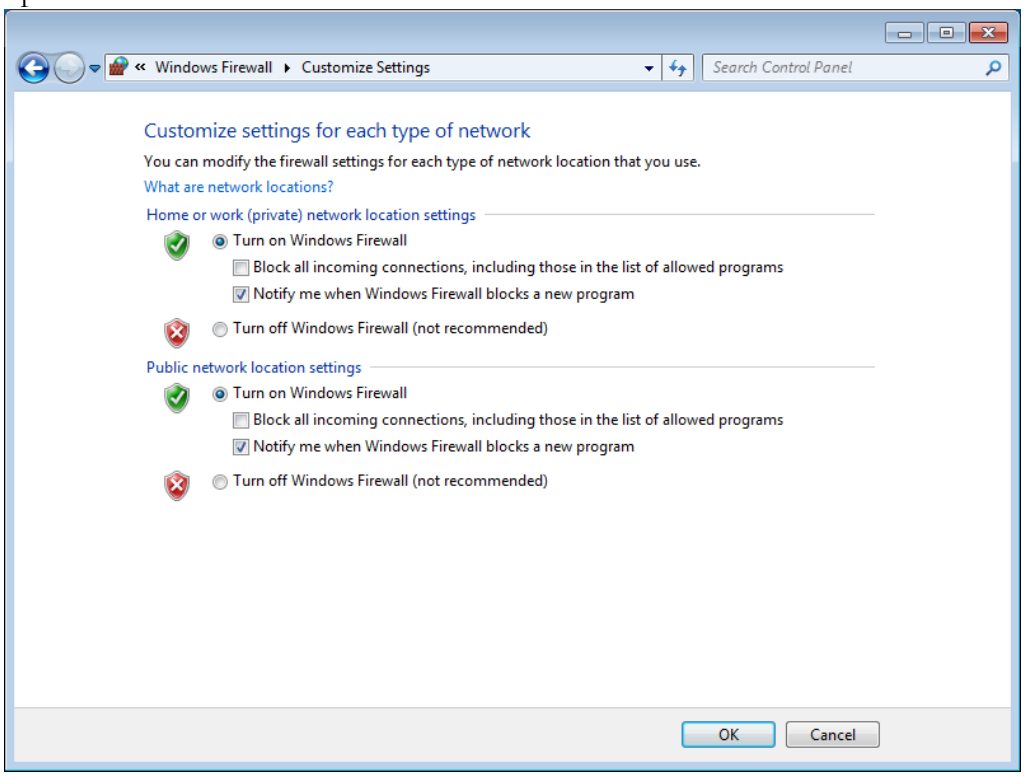
Firewall settings for Windows 7

The following steps describe the necessary steps for configuring the firewall on Windows 7:

1. Click **Control Panel > System and Security > Windows Firewall**.
2. Click **Turn Windows Firewall on or off**.

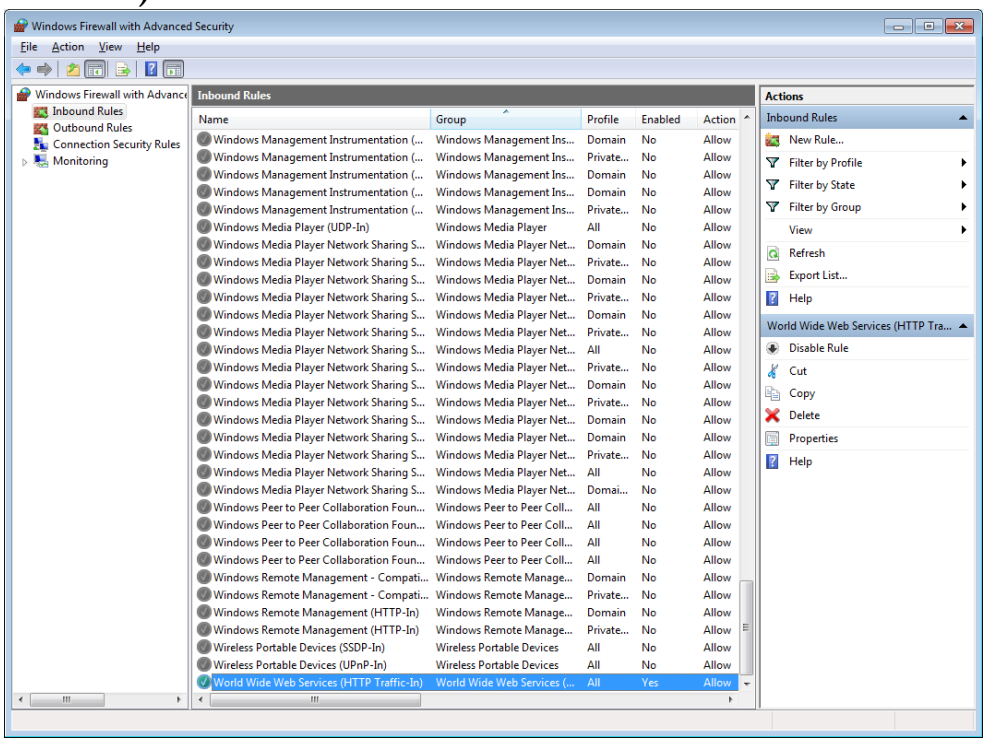

Control Panel ▸ System and Security ▸ Windows Firewall
Search Control Panel
Control Panel Home
Allow a program or feature through Windows Firewall
Change notification settings
Turn Windows Firewall on or off
Restore defaults
Advanced settings
Troubleshoot my network
Help protect your computer with Windows Firewall
Windows Firewall can help prevent hackers or malicious software from gaining access to your computer through the Internet or a network.
How does a firewall help protect my computer?
What are network locations?
Home or work (private) networks
Not Connected
Public networks
Connected
Networks in public places such as airports or coffee shops
Windows Firewall state:
On
Incoming connections:
Block all connections to programs that are not on the list of allowed programs
Active public networks:
nuance.com
Notification state:
Notify me when Windows Firewall blocks a new program
See also
Action Center
Network and Sharing Center

3. Ensure that **Block all incoming connections** is unchecked. Depending on the network used, this option can be found under **Home or work network** or **Public network**.

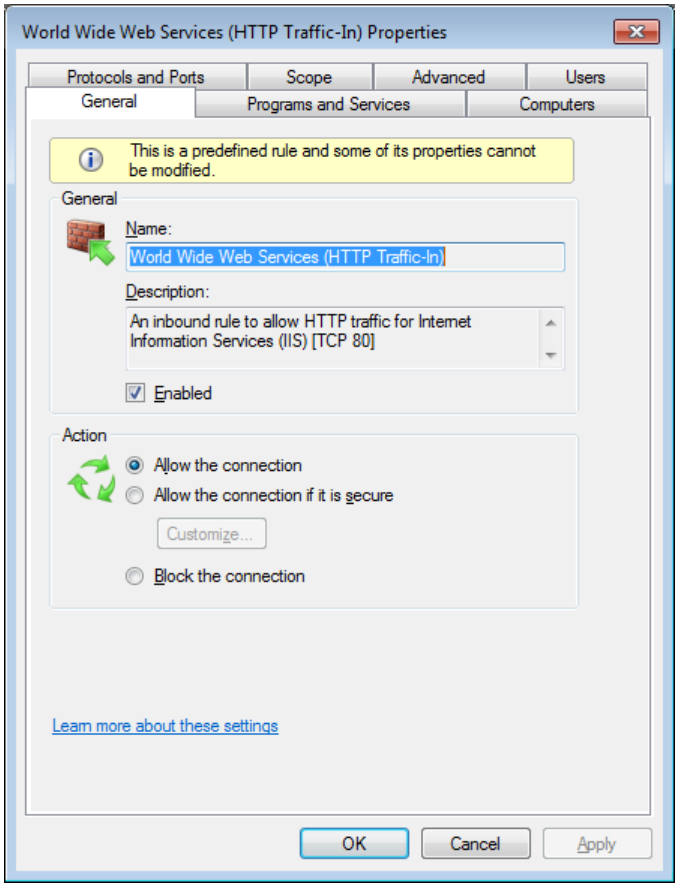

« Windows Firewall ▸ Customize Settings
Search Control Panel
Customize settings for each type of network
You can modify the firewall settings for each type of network location that you use.
What are network locations?
Home or work (private) network location settings
Turn on Windows Firewall
Block all incoming connections, including those in the list of allowed programs
Notify me when Windows Firewall blocks a new program
Turn off Windows Firewall (not recommended)
Public network location settings
Turn on Windows Firewall
Block all incoming connections, including those in the list of allowed programs
Notify me when Windows Firewall blocks a new program
Turn off Windows Firewall (not recommended)
OK
Cancel

4. Click **Advanced settings** on the **Windows Firewall** screen.

5. Select **Inbound Rules** in the treeview, double-click on **World Wide Web Services (HTTP Traffic-In)**.


Windows Firewall with Advanced Security
File Action View Help
Windows Firewall with Advanc
Inbound Rules
Outbound Rules
Connection Security Rules
Monitoring
Inbound Rules
Name Group Profile Enabled Action
Windows Management Instrumentation (... Windows Management Ins... Domain No Allow
Windows Management Instrumentation (... Windows Management Ins... Private... No Allow
Windows Management Instrumentation (... Windows Management Ins... Domain No Allow
Windows Management Instrumentation (... Windows Management Ins... Domain No Allow
Windows Management Instrumentation (... Windows Management Ins... Private... No Allow
Windows Media Player (UDP-In) Windows Media Player All No Allow
Windows Media Player Network Sharing S... Windows Media Player Net... Domain No Allow
Windows Media Player Network Sharing S... Windows Media Player Net... Private... No Allow
Windows Media Player Network Sharing S... Windows Media Player Net... Domain No Allow
Windows Media Player Network Sharing S... Windows Media Player Net... Private... No Allow
Windows Media Player Network Sharing S... Windows Media Player Net... Domain No Allow
Windows Media Player Network Sharing S... Windows Media Player Net... Private... No Allow
Windows Media Player Network Sharing S... Windows Media Player Net... All No Allow
Windows Media Player Network Sharing S... Windows Media Player Net... Private... No Allow
Windows Media Player Network Sharing S... Windows Media Player Net... Domain No Allow
Windows Media Player Network Sharing S... Windows Media Player Net... Private... No Allow
Windows Media Player Network Sharing S... Windows Media Player Net... Domain No Allow
Windows Media Player Network Sharing S... Windows Media Player Net... Domain No Allow
Windows Media Player Network Sharing S... Windows Media Player Net... Private... No Allow
Windows Media Player Network Sharing S... Windows Media Player Net... All No Allow
Windows Media Player Network Sharing S... Windows Media Player Net... Domai... No Allow
Windows Peer to Peer Collaboration Foun... Windows Peer to Peer Coll... All No Allow
Windows Peer to Peer Collaboration Foun... Windows Peer to Peer Coll... All No Allow
Windows Peer to Peer Collaboration Foun... Windows Peer to Peer Coll... All No Allow
Windows Peer to Peer Collaboration Foun... Windows Peer to Peer Coll... All No Allow
Windows Remote Management - Compati... Windows Remote Manage... Domain No Allow
Windows Remote Management - Compati... Windows Remote Manage... Private... No Allow
Windows Remote Management (HTTP-In) Windows Remote Manage... Domain No Allow
Windows Remote Management (HTTP-In) Windows Remote Manage... Private... No Allow
Wireless Portable Devices (SSDP-In) Wireless Portable Devices All No Allow
Wireless Portable Devices (UPnP-In) Wireless Portable Devices All No Allow
World Wide Web Services (HTTP Traffic-In) World Wide Web Services (... All Yes Allow
Actions
Inbound Rules
New Rule...
Filter by Profile
Filter by State
Filter by Group
View
Refresh
Export List...
Help
World Wide Web Services (HTTP Tra...
Disable Rule
Cut
Copy
Delete
Properties
Help

6. Ensure that the **Enabled** checkbox is checked and **Allow the connection** is selected.



Creating temporary storage for scanned media files

Scanned media files are stored in a temporary storage until DesktopDeliveryPSP starts processing them. This temporary storage has to be an SMB share. The device and the DesktopDeliveryPSP clients will use a dedicated user account to access the temporary storage.

Note:
The folder, share and account names in next sections are illustrations only. You are free to make your own destination and account choices when setting up your system.

The account **PSPUser** is used in these examples as an illustration. You can use any account that you want to grant access to the file share.

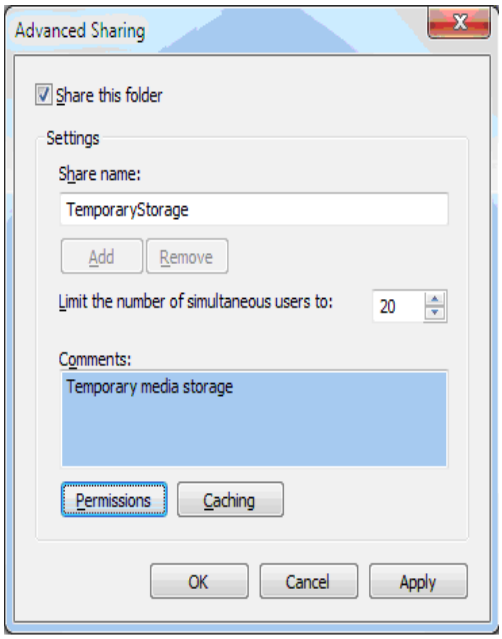
Providing SMB access to Temporary Storage

Note:

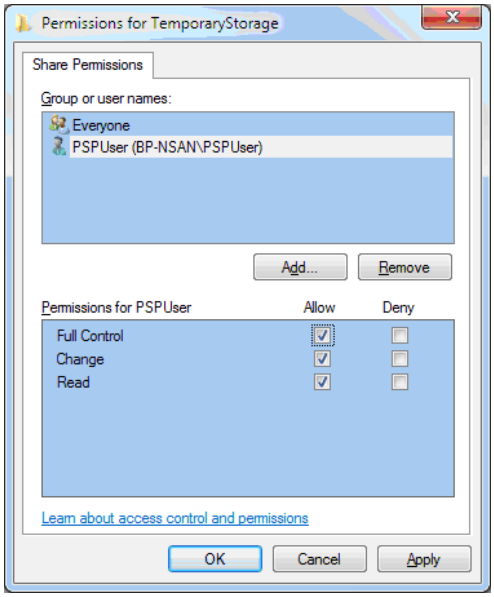
Make sure you first disable the folder option **Simple file sharing (recommended)** in **Folder settings** on Windows XP. (To learn more about advanced folder settings refer to your operating system manual.) Without enabling advanced file sharing you will not see some dialog boxes referenced in the following section.The server file system must be NTFS.

To provide SMB access to Temporary Storage:

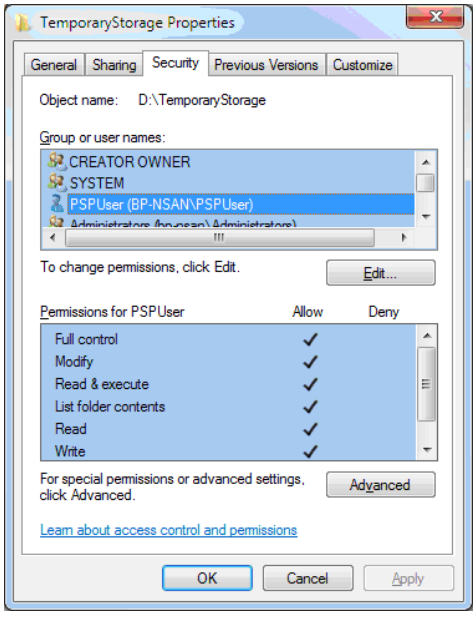
1. Open Windows Explorer and browse to the folder you want to use as the temporary storage. We will use the `c:\temp\TemporaryStorage` folder in this example.
2. Click **File** > **Properties** and select the **Sharing** tab then press the **Advanced Sharing…** button. (On Windows XP and Windows Server 2003 click **File** > **Sharing and Security...**).
3. Turn on the **Share this folder** option on the Sharing pane
4. Enter the following parameters:
    - Share name: **TemporaryStorage**
    - Comment: **Temporary media storage**



5. Click the **Permissions...** button.
6. Click the **Add…** button.
7. Turn on Full Control for the PSPUser account. In our example PSPUser is a dedicated account that will be used by the device and the DesktopDeliveryPSP clients to access the TemporaryStorage.



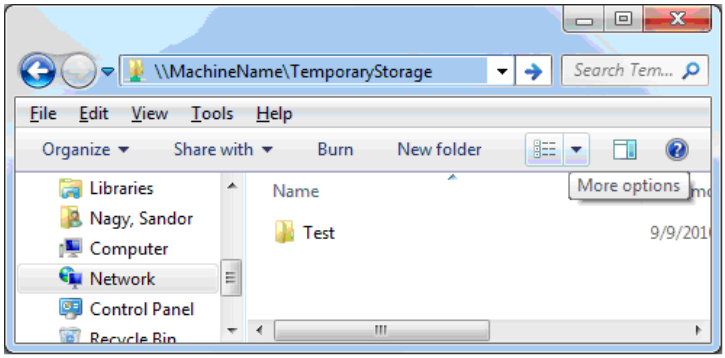
9. Click **OK** to close this dialog.
10. Select the **Security** tab.
11. Click the **Edit..** and then the **Add...** button. (On Windows XP or Windows Server 2003 click the **Add...** button.)
12. Enter PSPUser and click **OK** to close **Add Wizard**.
13. Select the PSPUser item in **Group or user names** list box.
14. Turn on Full Control for the PSPUser account.



15. Click **OK**. You have finished setting up SMB access to the folder **TemporaryStorage**.

Checking SMB access

1. Open Windows Explorer and navigate to `\\<<your computer name>>\TemporaryStorage`.
2. Create a new folder and name it **Test**.



3. Copy a file into this directory.
4. Make sure you do not get any error messages.
5. Delete the **Test** folder.
6. Choose another computer in your network and navigate to `\\<<your computer name>>\TemporaryStorage`.
7. Provide the PSPUser account details – user name and password – if prompted.
8. Create a new folder (name it **Test**).
9. Copy a file into this directory.
10. Make sure you do not get any error messages.
11. Delete the **Test** folder.

Your SMB configuration is now complete.

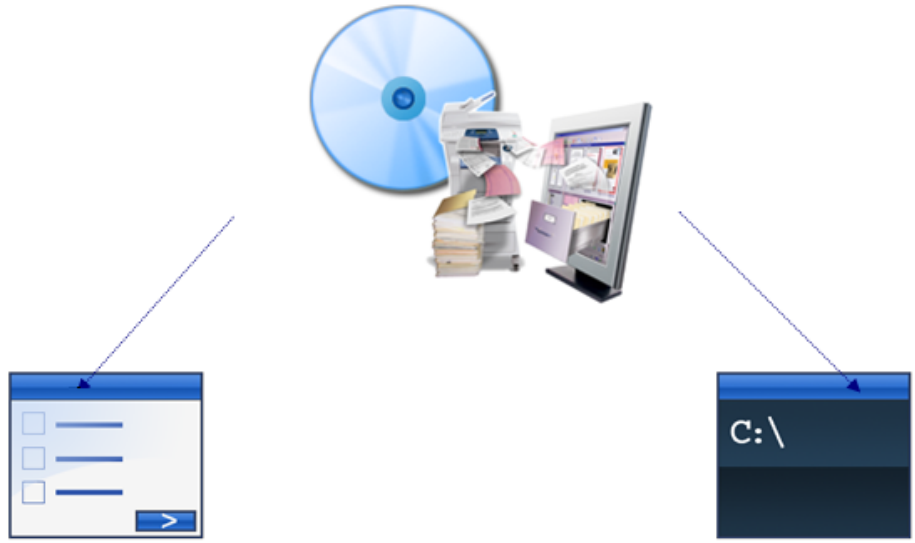
Authentication

If you require authentication functionality on your device (in order to setup a more secure working environment), an authentication module provided by Ricoh should be uploaded to the MFP devices. More detailed information can be from the Windows Authentication Service Installation and Configuration Guide found in this manual.

Installation alternatives

There are two alternatives to install the product: interactive and customized. Interactive presents you with a Wizard-like interface, whereas customized is recommended for advanced users. You can use either one to install the product.

To install the product use:



either Interactive installation…

or Customized Installation.

Administrative rights are necessary for the installer. On Microsoft® Windows® Server 2008 and Microsoft® Windows® 7, if the User Access Control (UAC) is switched on, an elevation request appears when the installer is launched.

After successful installation, a shortcut will be added to **Start Menu** > **(All) Programs** > **PPDM** > **PSP Delivery Module 3**:

- Administration Tool

Interactive Installation

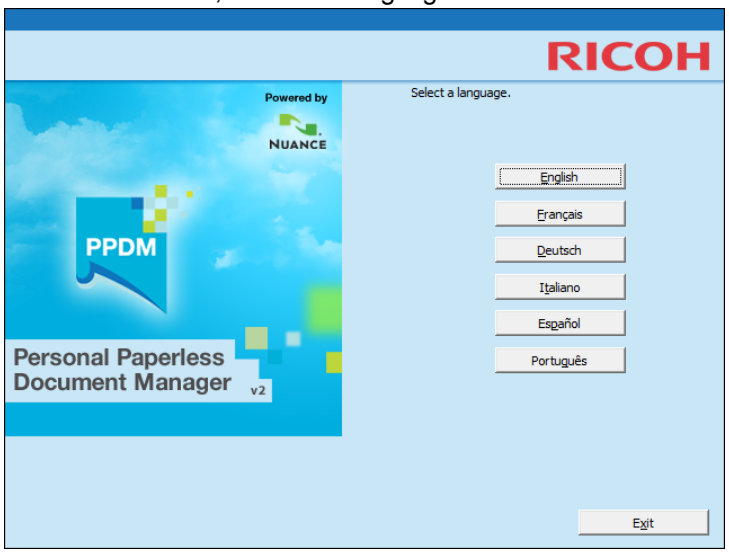
Tips before starting:

- It is recommended to take notes about each installation step to make it easier to restore your system or to roll back installation in case of a failure.

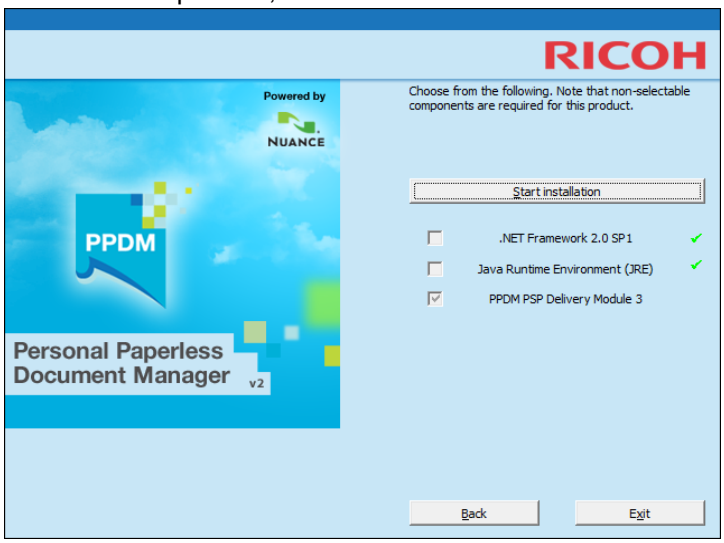
- Interactive product installation will create a virtual directory in IIS called **PPDM**, overwriting any existing ones with the same name.

How to start the installation

1. To start the installation, launch `AutoRun.exe`.
2. On the first screen, select the language.



3. Select the components, then click **Start installation**.

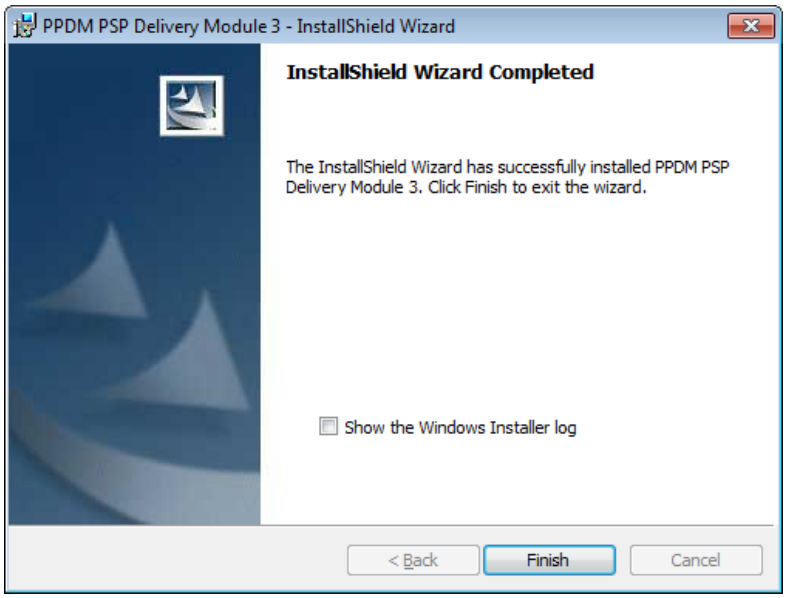


Before starting the installation, you can check the components to be installed. Microsoft® .NET Framework version 2.0 SP1 and Java™ Runtime Environment (JRE) version 1.5 or later are required for proper functioning. Turn off the installation of these component only if they are already installed on your machine (for example, through Windows update).

The installer checks for the necessary prerequisites before component installation:

- If IIS is not present, it reports the problem and installation stops. You have to install IIS and restart the server installation.
- The .NET component is not checked and inactive, if it is already present on the computer, otherwise it is checked.
- The PPDM component is always checked, and is inactive.
- If Java™ Runtime Environment version 1.5 or later is present on the computer, the option is not selected, and is inactive. If JRE 1.4 or earlier is present on the computer (or there is no JRE), it is checked by default, and can be unchecked.

A separate installer program for each component launches. Follow the installation instructions for each component. When the installation finishes, you can choose to check the Windows Installer log, if you have Windows Installer 4.5 or later.


PPDM PSP Delivery Module 3 - InstallShield Wizard
InstallShield Wizard Completed
The InstallShield Wizard has successfully installed PPDM PSP Delivery Module 3. Click Finish to exit the wizard.
Show the Windows Installer log
< Back
Finish
Cancel

PPDM PSP Delivery Module 3 Server

During the installation make sure that the "IP address" is the same as the "IP Address" on the "Web Site" tab in the IIS Management Console (for details see section Checking your IIS settings).

Service setup with the Administration application

Your application server and SMB shared folder are now ready to be registered to the Ricoh devices. First collect some information about your network and your device to proceed:

***Device** properties*:

IP address: ..... (e.g.: `10.140.24.30`)

***Application server** properties*:

IP address (or name): ..... (e.g.: `10.140.1.1`, or `rocket`)

Administration Tool URL: ....(e.g.: `http://10.140.1.1/PPDM/admin`)

***File server** properties*:

IP address (or name): .....(e.g.: `10.140.1.1`, or `rocket`)

SMB share path: .....(e.g.: `\\rocket\TemporaryStorage`)

All examples are illustrations only and have to be replaced with your own environment settings.

Steps to launch the Administration Tool

To launch the Administration tool:

1. Choose **Start Menu** > **(All) Programs** > **PPDM** > **PSP Delivery Module 3** > **Administration Tool** or type the Administration Tool URL (`http://10.140.1.1/PPDM/admin`) into a browser. If IIS is not permitted to serve dynamic content, you may get `HTTP Error 404 - File or Directory not found`. For guidelines on how to resolve this problem, see http://support.microsoft.com/kb/315122.
2. Depending on your network security settings, an authentication dialog may display. Log in as an administrator (the administration task involves modification of local files).
3. Select your interface language from the following: English, French, Italian, German, Portuguese or Spanish.

Using the Administration Tool

In the following section, we present a typical use case of this tool for system administrators.

This is only a working example to walk you through the most commonly used steps. Your actual administration activity is likely to differ from the one you find here.

Example Scenario

Suppose that your company purchases or rents one or more devices. A single device is usually enough for small and medium size businesses, while larger organizations might need several more devices.

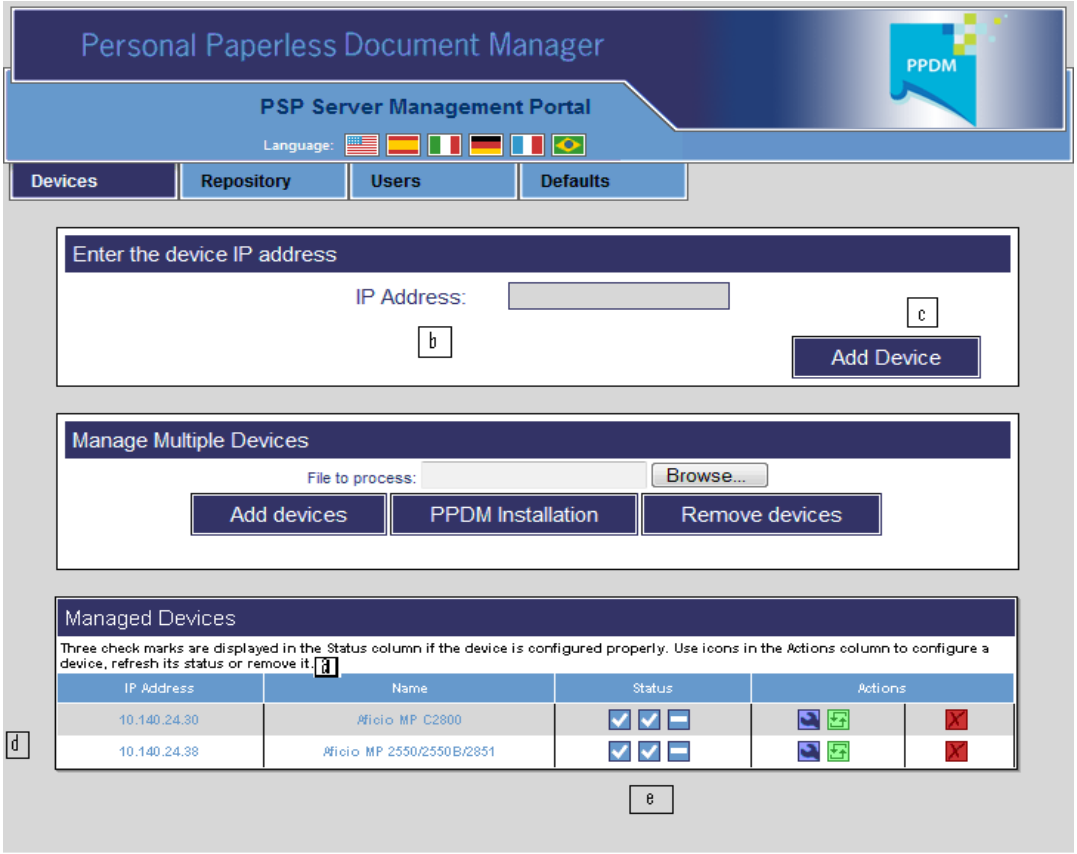
The device(s) are delivered and set up by an external expert with the help of the company's IT expert. This way, the IT professional will know the IP address and administrator login information.

Optional software components – for instance, the current package – are installed and the network infrastructure is created. The PPDM PSP Delivery Module 3 administrator role is assigned to a person with sufficient knowledge and experience (can be the same IT professional).

Administration Steps

Server Side Configuration

1. The first task of the administrator is to configure the server side settings of PPDM PSP Delivery Module 3. To do so, launch the **Administration Tool**.



   a. The **Managed Devices** table at the bottom is empty, indicating that the server does not manage any devices yet.

   b. Enter the device's IP Address.

   c. Click the **Add Device** button.

   d. A new row is added to the table containing the device information and the PPDM application is automatically installed on the device.

   e. Check the icons in the **Status** column to see if the device and the PPDM application are up and running correctly.

The first status indicator displays a check mark if the device is reachable at the specified IP Address. If the device does not appear to be reachable, check the IP Address and make sure the device is turned on.

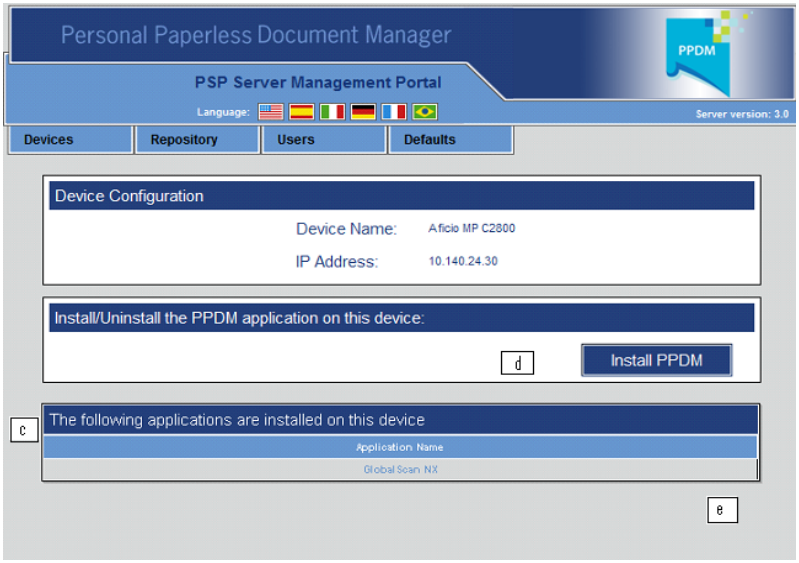
The second status indicator displays a check mark if the device is ESA capable. If the device is not ESA capable, the PPDM application cannot be used on the device.

The last status indicator displays a check mark if the PPDM application has been installed on the device.

Device Configuration

Normally, when you add a device, you should see three check mark indicators in the table. If the second status indicator signals ESA problems, you have to resolve them first and then perform this step.

2. Configuring the device.
    a. Click the blue Configure icon in the **Actions** column.
    b. The Device Configuration page is displayed.



    c. The table at the bottom is empty, indicating that the PPDM application is not yet installed on the device.
    d. Click the **Install PPDM** button.
    e. A new row is added to the table and the **Install PPDM** button changes to **Uninstall PPDM**.

Installation is now finished.

Administrators might also want to add or remove a device. In the most common cases a few devices are purchased or rented simultaneously and the necessary administration tasks are performed after installation.

Note:
If the PPDM application is removed from a device using the Administration Tool, the device is rebooted. Wait until the reboot finishes before taking any other action.

Adding New Devices

To set up additional devices manually, the administrator has to go through the following steps again:

1. Click the **Devices** tab (at the top).
2. Enter the device IP Address.
3. Click the **Add Device** button.
4. A new row is added to the table with the device information and the PPDM application is automatically installed on the device.
5. Check the icons in the **Status** column to see if the device and the PPDM application are up and running correctly.

If automatic installation was not successful, or if you want to uninstall the PPDM application from the device, proceed as follows:

6. Click the Configure icon (the blue wrench in the **Actions** column) associated with the new device.
7. The Device Configuration page is displayed with the IP Address and name of the new device.
8. Click the **Install PPDM** button.
9. A new row is added to the table and the **Install PPDM** button changes to **Uninstall PPDM**.

Removing Devices

To remove a device:

1. Go to the Devices page (choose the **Devices** tab at the top) and click the **Delete** icon in the **Actions** column.
2. The device is removed from the system and the PPDM application is automatically uninstalled from the device.
3. The table at the bottom is updated to reflect this change.

Uninstalling The PPDM Application From A Device

To uninstall the PPDM application from a device, do this:

1. Go to the Devices page (choose the **Devices** tab at the top) and click the Configure icon in the **Actions** column.
2. The Device configuration page is displayed.
3. Click the **Uninstall PPDM** button.
4. The application gets uninstalled from the device.

The table at the bottom is updated to reflect this change.

Managing Multiple Devices

When handling several devices, it is more convenient to utilize comma-separated text files – filled with device parameters – to carry out the following device management tasks:

- Adding several devices.
- Removing several devices.
- Installing / uninstalling the PPDM application on several devices.

Device management tasks are lengthy processes, so they are performed asynchronously. During such tasks the status icons in the Managed Devices table changes to a progress indicator.

A comma-separated text file for such purposes has to have the following structure:

Field name	IP	Install	Start
Accepted value(s)	String, valid IP address of a device	1, 0 (representing "Install" and "Uninstall", respectively)	1, 0 (representing "Start" and "Do not start", respectively)
Example	`100.255.23.45`	1	1

Device management task details

Adding devices: All fields are required and used. Devices are added one-by-one and – depending on the value of the Install field – PPDM application installation is also done. If the Install field's value is 1 (i.e. the PPDM application is installed on the device), it is automatically started if the Start field's value is 1. The **Start** field's value is ignored if the Install field's value is 0. Processing continues with the next row in the file in case of errors (for example, invalid IP address).

Sample CSV file content:

```
10.140.1.15,1,1
10.140.24.34,0,0
10.140.24.32,1,0
```

Explanation:

1. The device at `10.140.1.15` is added. PPDM installation is performed. PPDM starts automatically.
2. The device at `10.140.24.34` is added. PPDM installation is ***not*** performed.
3. The device at `10.140.24.32` is added. PPDM installation is performed. PPDM does ***not*** start automatically.

Removing devices: IP Address is the only required and used field (the Install and **Start** fields are ignored). Currently managed devices are enumerated and matched against the IP addresses in the file. If a match is found, the PPDM application is uninstalled automatically and the device is removed.

Sample CSV file content:

```
10.140.1.15,0,0
10.140.24.34,0,0
```

Explanation:

1. The device at `10.140.1.15` is removed
2. The device at `10.140.24.34` is removed

PPDM Installation: All fields are required and used. Currently managed devices are enumerated and matched against the IP Addresses in the file. If a match is found, the PPDM application is installed or uninstalled, depending on the content of the Install field. If the PPDM application is already installed and the content of the Install field is 1, the installation is updated. If PPDM is not installed and the content of the Install field is 0, no action is taken. If the Install field's value is 1 (that is, the PPDM application is installed on the device), it is automatically started if the **Start** field's value is 1. The **Start** field's value is ignored if the Install field's value is 0.

Sample CSV file content:

```
10.140.1.15,1,1
```

```
10.140.1.15,1,0
10.140.24.34,0,0
```

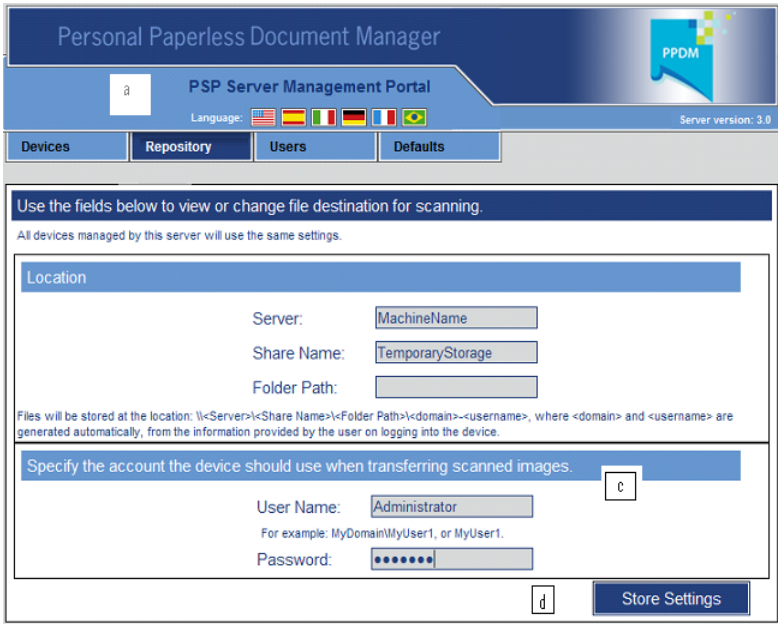
Explanation:

1. PPDM is installed on the device at `10.140.1.15`. PPDM starts automatically.
2. PPDM is installed on the device at `10.140.1.15`. PPDM does ***not*** start automatically.
3. PPDM is uninstalled from the device at `10.140.24.34`.

The result of each batch operation is a log file that is accessible from the Administration Tool.

Setting The Device Working Folder

3. The next step is to set the working folder of the device. This is where images will temporarily be stored:
    a. Click the **Repository** tab (at the top).
    b. The Repository page is displayed.



    c. Enter the information of a shared folder along with an account that the device and the DesktopDeliveryPSP clients will use to reach this location.
    d. Click the **Store Settings** button.

Initial server administration is done and the system is ready to work.

Important!
For full functionality, client side installation is also required.

Repository Changes

File transfer location changes are not quite frequent (c.f. email system changes within an organization). However, the Administration Tool gives you the option to do this.

To change the file transfer location:

1. Click the **Repository** tab (at the top).
2. Change the parameters.
3. Click the **Store Settings** button.

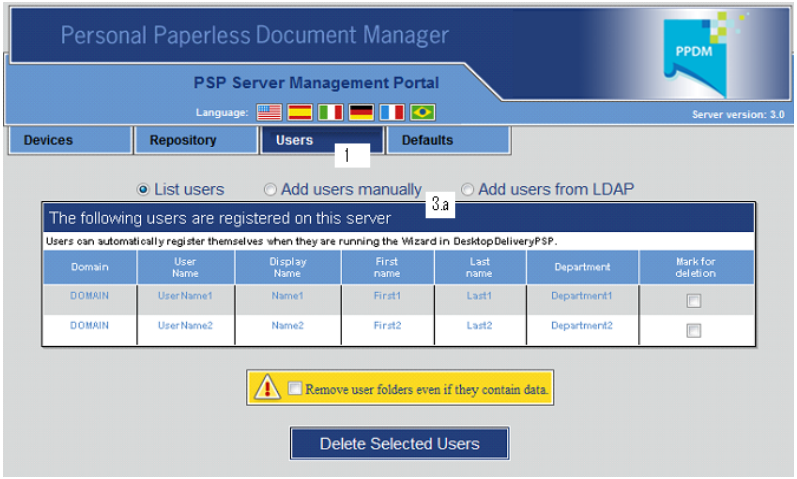
User Management

Administrators are usually not required to manage user lists, because clients are able to automatically register themselves and use the system without any administrator interaction.

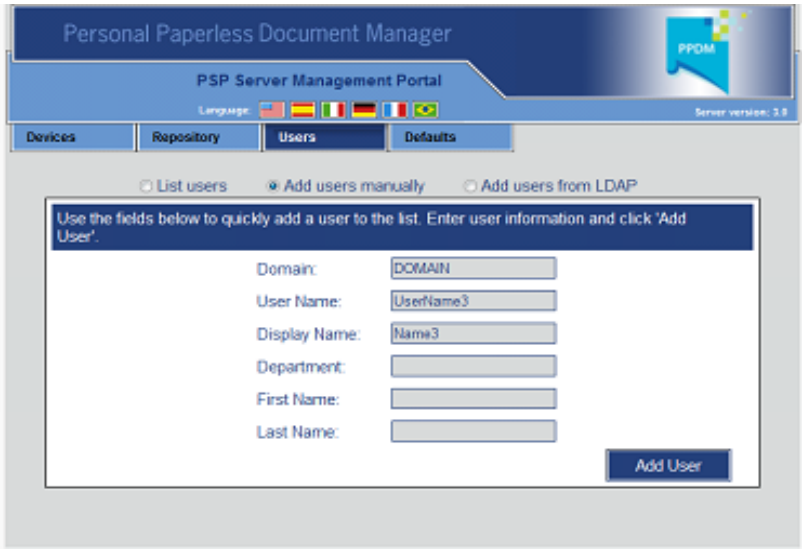
On the other hand, we provide an administration tool to add/remove users and user groups to/from the system.

Adding users

1. Click the **Users** tab (at the top).
2. The User Management page is displayed with the list of already registered (manually by the administrator or automatically by the clients themselves) users.



3. To add a single user manually:
    a. Pick the **Add users manually** option.
    b. The page changes to this:



c. Enter user information.

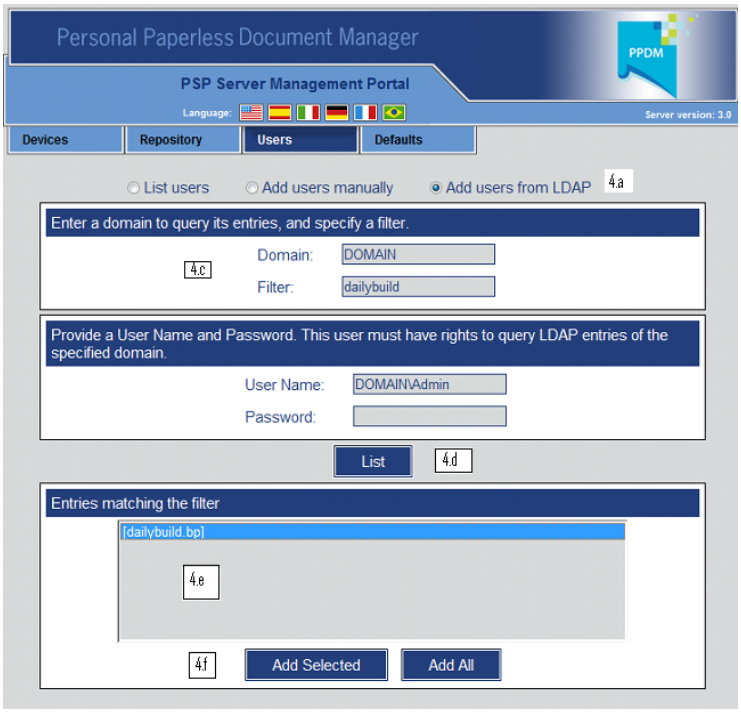
d. Click the **Add User** button.

e. The page reverts to the user list.

4. To add several users:

   a. Pick the **Add users from LDAP** option.

   b. The page changes to this:



c. Provide the LDAP server and its access parameters. Leave the **Filter** field blank to get access to each user and group available within LDAP.

Important!

The same sets of users and groups are returned regardless whether the domain is specified with or without the **.com** suffix (e.g. `exampledomain` and `exampledomain.com`). Use the domain name without the .com suffix, otherwise DesktopDeliveryPSP clients may not be able to connect to the PSP Server and users may not be identified correctly.

d. Click the **List** button.

e. The list at the bottom of the screen is populated with the entries matching the filter. Individual users and user groups are also displayed in the list.

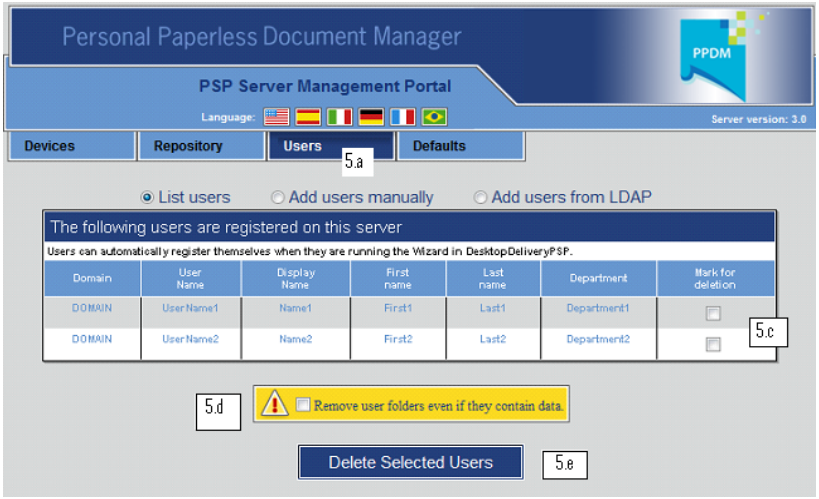
f. Select several users and click **Add Selected**,
or
Press the **Add All** button.

g. The page reverts back to the user list.

To remove users:

a. Click the **Users** tab (at the top).

b. The User Management page is displayed with the list of already registered (manually by the administrator or automatically by the clients themselves) users.



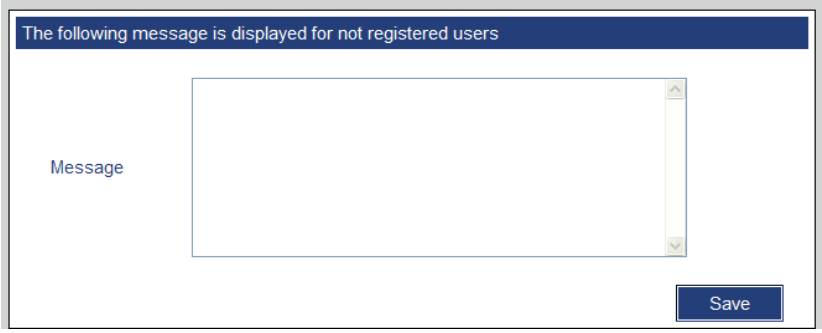
c. Mark the appropriate boxes in the **Mark for deletion** column.

d. Decide if user data should be deleted (mark the checkbox in the yellow field below the table).

e. Click the **Delete Selected Users** button.

f. The table updates to reflect the changes.

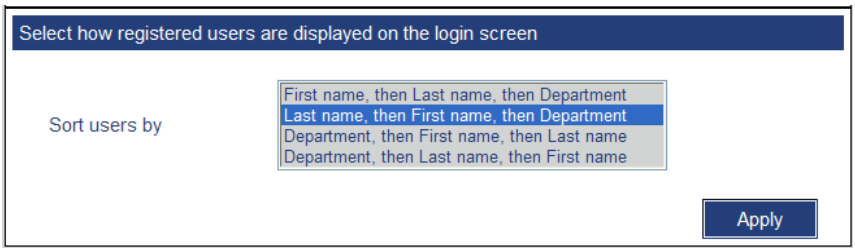
Displaying A Customized Message To Unregistered Users



1. Click the **Users** tab (at the top).
2. Enter your customized text in the Message area. You might want to include details, such as how to get the client software, whom users should contact in case they need access to the PPDM application, etc.
3. Click the **Save** button.

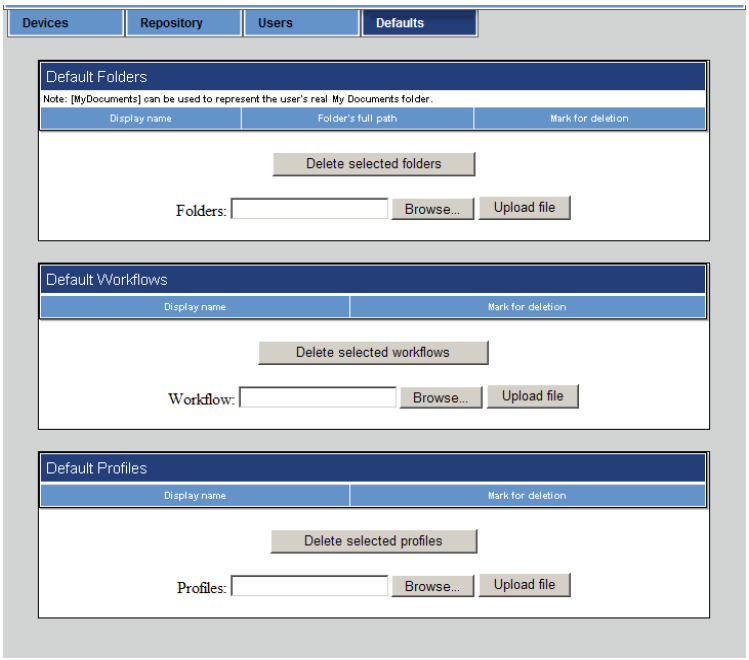
Your customized message is going to be displayed on the device panel for users who are not registered on the server.

Sorting login names on the device panel


Select how registered users are displayed on the login screen
Sort users by
First name, then Last name, then Department
Last name, then First name, then Department
Department, then First name, then Last name
Department, then Last name, then First name
Apply

1. Click the **Users** tab (at the top).
2. Set the order for displaying user names on the device panel.
3. Click the **Apply** button.

Defaults



Administrators are usually not required to manage user settings, because users are able to customize the device screen using their own destination folders and scanning preferences through the Personalized MFP Scanning Wizard. On the other hand, we provide an administration tool to add/remove default folders, workflows and profiles.

Important!

These defaults will appear on the device screen - below the users' own items.

This happens in the following cases if the user:

- Restarts DesktopDeliveryPSP.
- Updates the user's own preferences through the Wizard.
- Selects the Refresh defaults item from the context menu of the DesktopDeliveryPSP system tray icon.

Default folders

Use comma-separated text files – filled with folder information – to specify destination folders for all users. These comma-separated text files have to have the following structure

Field name	Path	Display name
Accepted value(s)	String, full path of a folder	String, short display name of the path as it will appear on the device's main screen
Example	Q:\Year2009\Common\Accounting	Accounting

To create default destination folders (administrator's tasks)

1. Create the comma-separated text file, containing the full path and the display name of the destination folders.
2. Click the **Defaults** tab (at the top)

3. Click the **Browse** button in the **Default Folders** section, next to **Folders file**.
4. Select the comma-separated text file in the **File Open** dialog and click **OK**.
5. Click the **Upload File** button in the **Default Folders** section.
6. The file is uploaded, processed and the default folders are displayed.

Sample CSV file content:

```
C:\temp,MyTemp
Q:\Year2009\Common\Accounting,Accounting[MyDocuments]\ScannedFiles,Scanned files
```

Explanation

1. The user will see the **MyTemp** item on the device screen. If this item is selected, the scanned document is delivered into the `C:\temp` folder on the user's machine.
2. The user will see the Accounting item on the device screen. If this item is selected, the scanned document is delivered into the `Q:\Year2009\Common\Accounting` folder on the user's computer.
3. The user will see the Scanned files item on the device screen. If this item is selected, the scanned document is delivered into the `C:\Documents and Settings\<User>\My Documents\Scanned files` folder on the user's PC. The `[MyDocuments]` meta tag should be used when the administrator wants to use a path within the user's own **My Documents** folder. (This meta tag is resolved on the user's machine locally).

Important!

If there are special, accented (e.g. ô, ÿ…) characters in the folder names, the CSV file has to be saved in Unicode format or with UTF8 encoding. Otherwise neither the device nor the DDPSP client might be able to properly display and/or use the folder name.

Default workflows

Use OmniPage to create workflows available for all users on their machines.

Note:

Workflows of OmniPage 16 or earlier versions are not compatible with OmniPage 17.

To create default workflows as an administrator

1. Create one or more workflows in OmniPage and export them to a location accessible through the Administration tool.
2. Click the **Defaults** tab (at the top).
3. Click the **Browse** button in the **Default Workflows** section, next to **Workflow file**.
4. Select the workflow file in the **File Open** dialog and click **OK**.
5. Click the **Upload File** button in the **Default Workflows** section
6. The file is uploaded, processed and the default workflow is displayed.
7. Workflow files can be uploaded one-by-one. If you have more workflows to upload, repeat the above steps.

Sample:

The administrator uses the Workflow Assistant in OmniPage (Tools menu/Workflow Assistant item) to create a workflow, with steps necessary to handle an invoice. The workflow is exported from OmniPage (Tools menu/Workflows item) as Invoice, and then uploaded to the server through the Administration Tool. The user will see the Invoice item on the device screen. If this item is selected, the scanned document is loaded into OmniPage on the user's machine and processed using the Invoice workflow.

Default profiles

As an administrator, use PaperPort to create profiles available for all users on their own machines.

To create profiles

1. Create one or more profiles in PaperPort.
2. Close PaperPort.
3. Copy the `profiles.xml` file to a location accessible through the Administration tool from:
    - XP, 2003 Server: `C:\Documents and Settings\All Users\Application Data\Nuance\PaperPort\12\` folder.
    - Vista and later: `C:\ProgramData\Nuance\PaperPort\12\` folder.
4. Click the **Defaults** tab (at the top).
5. Click the **Browse** button in the **Default Profiles** section, next to **Profiles file**.
6. Select `Profiles.xml` in the **File Open** dialog and click **OK**.
7. Click the **Upload File** button in the **Default Profiles** section. The file is now uploaded, processed and the default profiles are displayed.

Sample:

The administrator uses PaperPort to create profiles (e.g. ColorScan, LowResBW…), containing the scanning parameters, image processing and destination format options. The profiles are uploaded to the server through the Administration Tool. The user will see the ColorScan, LowResBW… items on the device screen. If an item is selected, the document is scanned and processed, as described in the profile.

Customized installation (advanced)

Customized installation is recommended for advanced administrators. To install the product this way, complete the following steps:

Important!

It is an imperative that all prerequisites are already installed before you perform the following steps.

Extract product files to a specific folder

Use the following command line to extract application files to a dedicated folder:

```
msiexec.exe /i "PSPServer.msi" IIS=0 SERVERIPADDRESS="???.???.???.???:??"
INSTALLDIR="?:\????"
```

Installer Command-line Parameters

IIS	Interaction with IIS. IIS=0: Extract into a specific folder and do not interact with IIS. IIS=1: Extract into a specific folder and interact with IIS to register the virtual folders.
SERVERIPADDRESS	You need to specify the IP address of the computer and a port number.
INSTALLDIR	Destination folder for product files.
PREREQ_IIS_ INSTALLEDONPORT80	Interactive installation may fail with the following error: `Check if your IIS is configured to listen at port 80. To install the application without this check refers to the Server Administrator's Guide. Installation will now abort.` Use this command line parameter to disable the check.
REMOVESETTINGS=""	By using this parameter, you can keep your setting files when uninstalling or removing the product.

If `SERVERIPADDRESS` is specified, the appropriate files will be replaced with the ones containing the specified IP address. Otherwise, you have to modify some files manually after installation: these are listed in the next section. If you do not specify a server IP address and port number, the name of your computer will be used by default.

When `PREREQ_IIS_INSTALLEDONPORT80="2"` is specified, the IIS settings are not examined and the `Check if your IIS is configured to listen at port 80. To install the application without this, check refer to the Server Administrator's Guide. Installation will now abort.` error message is suppressed.

It is also a good practice to turn on installer logging and to check the log file after installation. We suggest consulting the Windows Installer documentation on the `lvx* <log file>` command line parameter and its usage.

Set-up Web Services in IIS web site

The following is applicable for IIS 5.1, or 6.0:

1. Create a base virtual directory

1. Click the Windows Start menu then choose **Control Panel** > **Administrative Tools** > **Internet Information Services**.
2. Select **<COMPUTER>/Web Sites/Default Web Site**.
3. Click: **Action** > **New** > **Virtual Directory...**
4. The Virtual Directory Wizard appears. Set up your virtual directory with the following parameters:
   - Alias: PPDM
   - Directory: `C:\Program Files\PPDM\PSP Delivery Module 3` (or the directory you have specified in the INSTALLDIR property)
   - Permissions for this directory: (read, run scripts (such as ASP) and browse checked; write, execute (such as ISAPI applications or CGI) unchecked)
5. Click **Finish** to complete the Wizard.
6. Select the new virtual directory.
7. Click **Actions** > **Properties**. The Virtual directory properties dialog appears.
8. Select the **Low (IIS Process)** Application protection option.
9. Click **OK**.

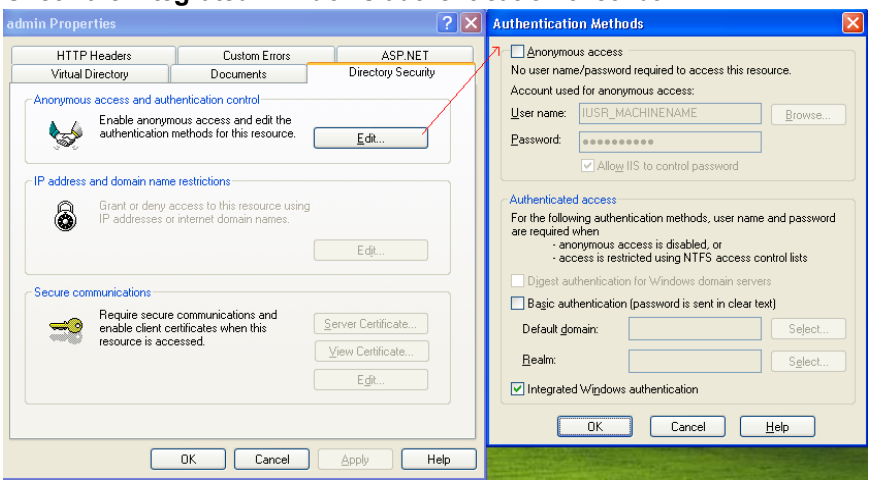
2. Create a virtual directory for product administration
   1. Select the **PPDM** virtual directory.
   2. Click **Action** > **New** > **Virtual Directory...**

The Virtual Directory Wizard appears. Set up your virtual directory with the following parameters:

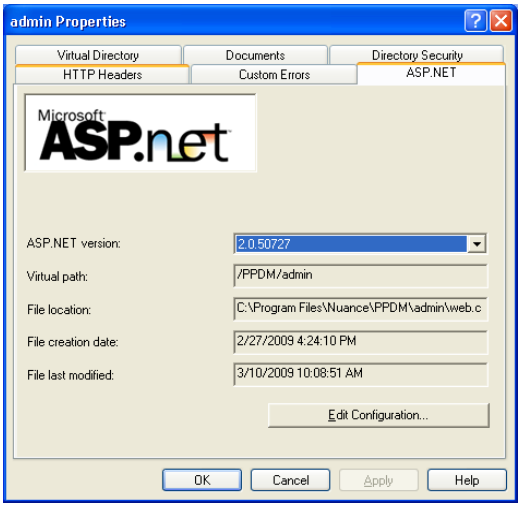
- Alias: admin
- Directory: `C:\Program Files\PPDM\PSP Delivery Module 3\admin` (or the directory you have specified in the `INSTALLDIR` property)
- Permissions for this directory:
  - Read, run scripts (such as ASP), execute (such as ISAPI applications or CGI) and write checked.
  - Browse unchecked.

3. Click **Finish** to complete the Wizard.
4. Select this new `PPDM\admin` virtual directory.
5. Click **Actions** > **Properties**. The virtual directory properties dialog appears.
6. Select the **Directory Security** pane.
7. Click the **Edit** button under the **Anonymous access and authentication control** section. The **Authentication Methods** dialog displays.
8. Uncheck the **Anonymous access** checkbox.

9. Check the **Integrated Windows authentication** checkbox.



10. Click **OK** to close the **Authentication Methods** dialog.
11. Select the **ASP.NET** pane.
12. Choose `2.0.50727` in the ASP.NET version combo box.



13. Click **OK** to finish setup.
14. Select the new virtual directory.
15. Click **Actions** > **Properties**. The virtual directory properties dialog appears.
16. Select the **Low (IIS Process)** application protection option.
17. Click **OK**.

3. Create the PPDM UI virtual directory
    1. Select the **PPDM** virtual directory.
    2. Click **Action** > **New** > **Virtual Directory...**

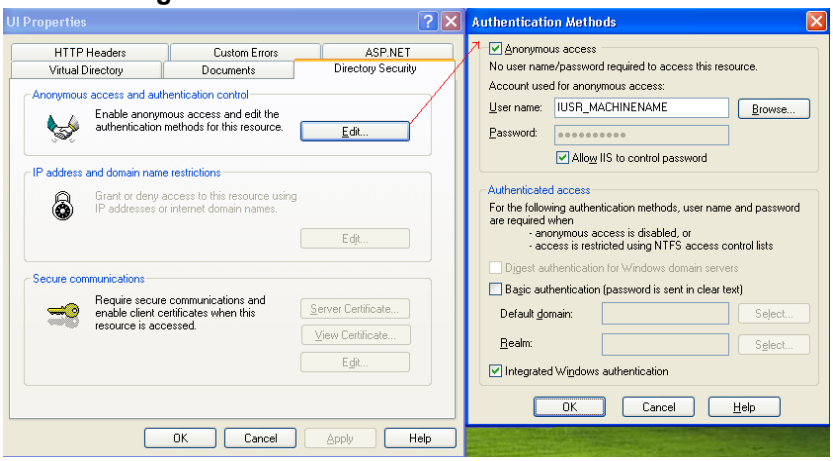
The Virtual directory wizard displays. Set up your virtual directory with the following parameters:

- Alias: UI
- Directory: `C:\Program Files\PPDM\PSP Delivery Module 3\UI` (or the directory you have specified in the `INSTALLDIR` property)
- Permissions for this directory:

Read, run scripts (such as ASP) execute (such as ISAPI applications or CGI) and write checked

Browse unchecked

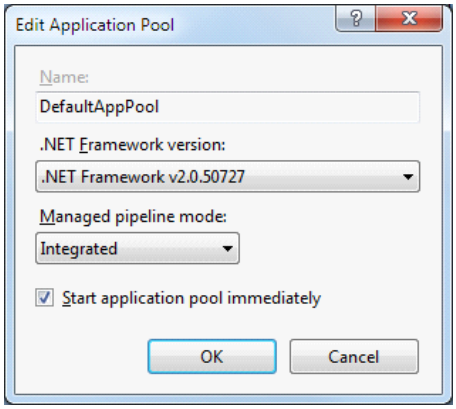
3. Click **Finish** to complete the Wizard.
4. Select the `PPDM\UI` virtual directory.
5. Click **Action** > **Properties**. The **UI Properties** dialog appears.
6. Select the **Directory Security** pane.
7. Click the **Edit** button under the **Anonymous access and authentication control** section. The **Authentication Methods** dialog displays.
8. Mark the **Anonymous access** checkbox.
9. Mark the **Integrated Windows authentication** checkbox.



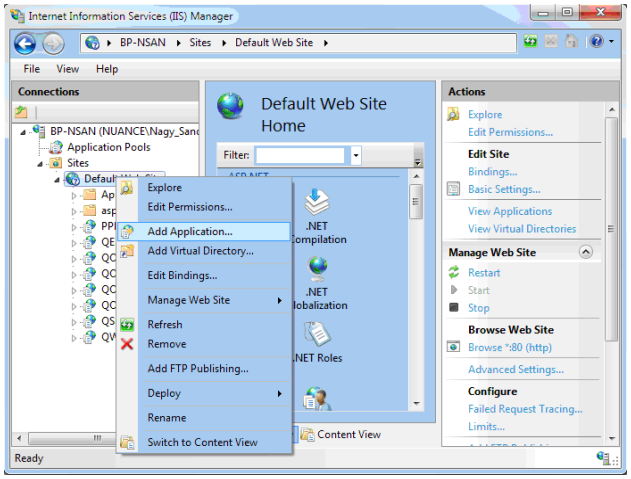
10. Click **OK** to close the **Authentication Methods** dialog.
11. Select the **Documents** pane.
12. Click the **Add** button.
13. Enter `Index.aspx` and click **OK**.
14. Select the **ASP.NET** pane.
15. Choose `2.0.50727` in the **ASP.NET version** combo box.
16. Click **OK** to complete setup.
17. Select the new virtual directory.
18. Click **Actions** > **Properties**. The Virtual directory properties dialog appears.
19. Select the **Low (IIS Process)** Application protection option.
20. Click **OK**.

The following is applicable for IIS 7.0 or 7.5:

1. Set .NET version for the Application Pool.
    1. Start IIS Administration Console: Click the **Windows Start** menu then choose **Control Panel** > **Administrative Tools** > **Internet Information Services**.
    2. Select `<<Computer name>>(<<current user>>)\Application Tools`.
    3. Select the Application Pool you with to use and select the **Basic Settings…** from the **Actions** menu.
    4. Check that the **.NET Framework version** is **.NET Framework v2.0.50727**.

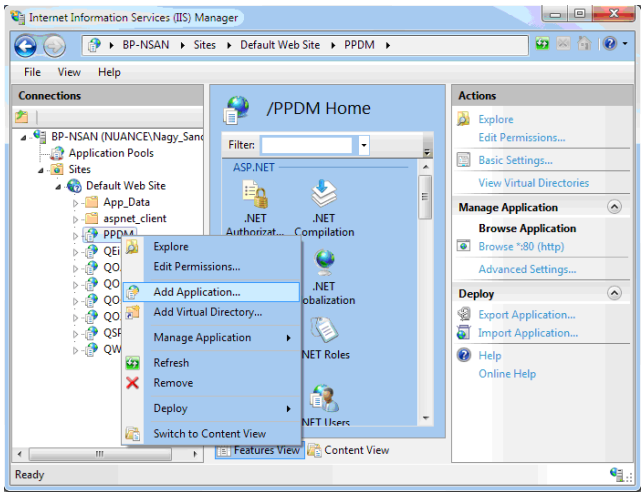


2. Create a base web application.
    1. Select Sites/Default Web Site.
    2. Right click on it and select **Add Application…**.



    3. The **Add Application** dialog appears. Set up your web application with the following parameters:
        - Alias: PPDM
        - Physical path: `C:\Program Files\PPDM\PSP Delivery Module 3` (or the directory you have specified in the `INSTALLDIR` property)
    4. Click **OK** to complete the web application creation.

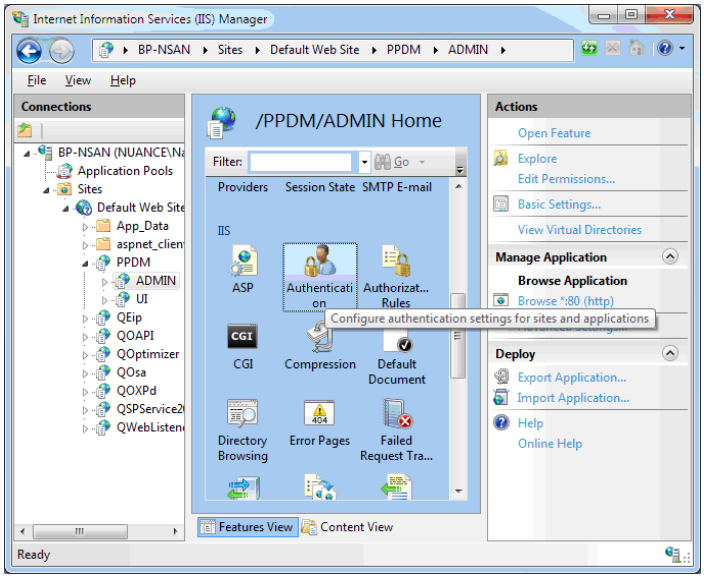
3. Create a web application for product administration.
    1. Select the **PPDM** web application.
    2. Right click on it and select **Add Application…**.



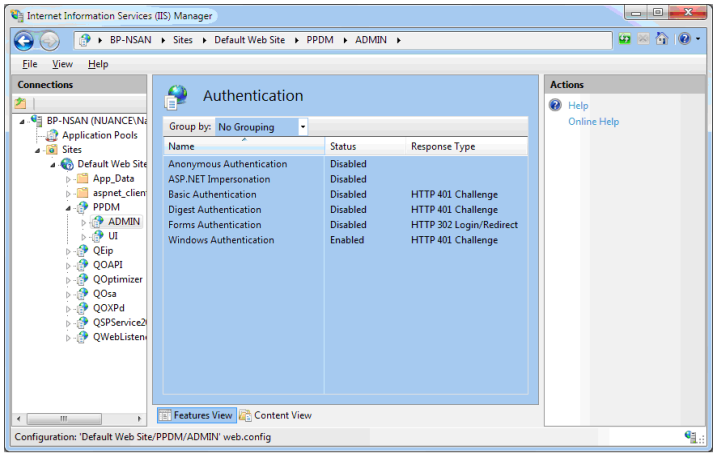
3. The **Add Application** dialog appears. Set up your web application with the following parameters::

- Alias: ADMIN
- Physical path: `C:\Program Files\PPDM\PSP Delivery Module 3\admin` (or the directory you have specified in the `INSTALLDIR` property)

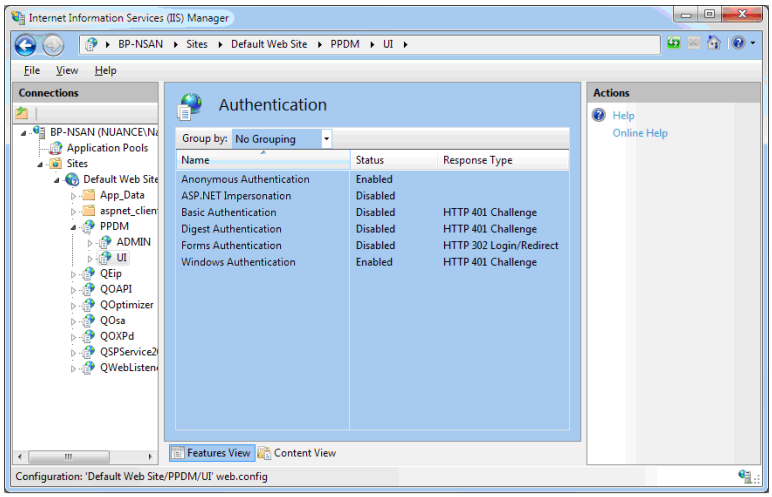
4. Click **OK** to complete the web application creation.
5. Select this new **PPDM\ADMIN** web application.
6. In the **Features View** part of the screen double click on the **Authentication** icon.



4. Disable the **Anonymous Authentication** option.
5. Enable the **Windows Authentication** option.



4. Create the PPDM UI web application.
    1. Select the **PPDM** web application.
    2. Right click on it and select **Add Application…**.
    3. The Add Application dialog appears. Set up your web application with the following parameters:
    - Alias: UI
    - Physical path: `C:\Program Files\PPDM\PSP Delivery Module 3\UI` (or the directory you have specified in the `INSTALLDIR` property)
    4. Click **OK** to complete the web application creation..
    5. Select this new **PPDM\UI** web application.
    6. In the **Features View** part of the screen double click on the **Authentication** icon.
    7. Enable the **Anonymous Authentication** option.
    8. Enable the **Windows Authentication** option.

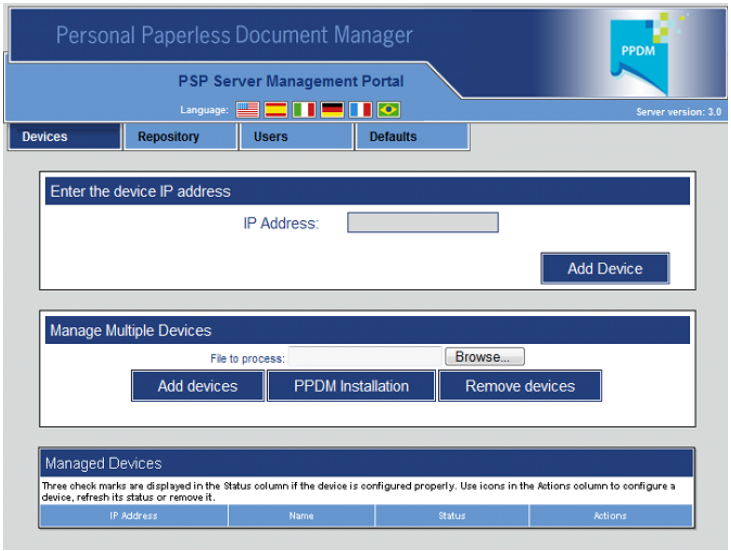


The product will create run-time application data files in the `<<Common Application Data>>\Nuance\PPDM` folder (e.g. `C:\ProgramData\Nuance\PPDM`). Make sure that the application has access to this folder and can create directories and files in it run time.

Check the correct setup of Web Services in IIS

To check the correct setup of Web Services in IIS

1. Open a browser and enter the following address: `http://<<your site IP>>:<<your site port>>/PPDM/admin`. If IIS is not permitted to serve dynamic content, you may get `HTTP Error 404 - File or Directory not found`. For guidelines on how to resolve this problem, see http://support.microsoft.com/kb/315122.
2. An authentication window displays. Authenticate yourself and the **PSP Server Management Portal** application will launch. UI language can be changed to the following: English, French, Italian, German, Portuguese or Spanish.



3. Make sure you receive no error messages and close your browser.

Changing server IP address after setup

If you did not specify the server IP Address during installation you have to make additional modifications to regain the services of the PPDM PSP Delivery Module 3 server.

The following list of files reference a URL. Obsolete URLs have to be replaced with the correct ones in each of them. Although it is possible to change server IP addresses this way, it is not recommended. Consider reinstalling the PSP Server instead.

The files to be modified are:

`<installdir>/admin/Web.Config`

`<installdir>/UI/RXOP/ppdm.zip/ppdm.dalp`

To update the PPDM.DALP file

1. Step into the installation folder (`C:\Program Files\PPDM\PSP Delivery Module 3` by default).
2. Step into the `UI\RXOP` sub folder within the install folder.
3. Extract the content of `PPDM.zip` into a temporary folder.
4. Open the extracted `PPDM.DALP` file in a text editor.
5. Locate the `<application-desc>` element.
6. Locate the first `<argument>` within the `<application-desc>` element. Update the URL with the server's IP address.
7. Save the `PPDM.DALP` file.
8. Compress the content of the temporary folder and save it as `PPDM.zip` into the `UI\RXOP` sub folder of the installation folder, overwriting the original `PPDM.zip` file. It is a good practice to create a backup copy of `PPDM.zip` before overwriting it with the modified content!
9. (Re)install the PPDM application to the device using the Administration Tool.

Troubleshooting tips

JAVA path configuration

The installation of the PPDM PSP Delivery Module 3 application onto the device requires Java™ Runtime Environment (JRE) version 1.5 or later being installed and the corresponding `Java.exe` being accessible for the Administration Tool. If these preconditions are not met, the PPDM PSP Delivery Module 3 server installer displays a warning and the Administration Tool reports an error.

Depending on the configuration of the server machine (e.g. a different Java-based application requires a different JRE version on the same machine) these requirements might conflict with those of other applications, therefore the Administration Tool allows the administrator to specify where to look for `Java.exe`.

To specify where the Administration Tool should look for `Java.exe`, perform the following steps:

1. Open the installation folder (`C:\Program Files\PPDM\PSP Delivery Module 3` by default).
2. Open the UI sub folder within the installation folder.
3. Open the `web.config` file in a text editor.
4. Locate the `<add key="JavaPath" value=""/>` element.
5. Modify the value so that it points to a folder where `Java.exe` – corresponding to JRE version 1.5 or later – is located.
6. Save the `web.config` file.

Whenever the administrator starts installing or uninstalling the PPDM application – either manually or in batch mode – the Administration Tool will check the value of the JavaPath key in the `web.config` file. If this value is:

- not empty: the Administration Tool will use `Java.exe` from the specified folder.
- empty: the Administration Tool will assume that a proper version of `Java.exe` is on the PATH.

In either case, the version information of `Java.exe` will also be checked before starting the installation or un-installation of the PPDM application.

Logging

Administrators can collect PPDM log information through:

- Ricoh's Remote Log Sender application. Consult the device documentation on how to install and use this tool.
- The PPDM applications own logging infrastructure.

The following section describes the necessary steps to turn on PPDM logging.

1. Uninstall the PPDM application from the device using the Administration tool.
2. Open the installation folder (`C:\Program Files\PPDM\PSP Delivery Module 3` by default).
3. Open the `UI\RXOP` sub folder within the installation folder.
4. Extract the content of `PPDM.zip` into a temporary folder (for example, `C:\temp\ppdm`).
5. Open the extracted `PPDM.DALP` file (for example, `C:\temp\ppdm\ppdm.dalp`) in a text editor.
6. Locate the **<application-desc>** element.

7. Locate the 5th **<argument>** within the **<application-desc>** element. Change its value to trace, info or none, depending on the required level of logging:
    a. **trace**: verbose logging, default after installation
    b. **info**: moderate logging
    c. **none**: no logging at all
8. Locate the 6th **<argument>** within the **<application-desc>** element. Change its value to **telnet**, **file**, **systemout** or **none**, depending on the required logging method:

d. **telnet**: log messages are sent to the standard output stream and to the output stream of a server socket which listens on the port specified in the 7th **<argument>**.

e. **file**: log messages are sent to the standard output stream and to a file that can be downloaded by a server socket listening on the port specified the 7th **<argument>**.

f. **systemout**: log messages are sent to the standard output stream only.

g. **none**: no logging at all, default after installation.

9. Locate the 7th **<argument>** within the **<application-desc>** element. Change its value (default value is 1000 after installation) to a port to be used for **telnet** or **file** logging. This argument is ignored if logging is set to **systemout** or **none**.
10. Save the `PPDM.DALP` file.
11. Compress the content of the temporary folder and save it as `PPDM.zip` into the `UI\RXOP` sub folder of the installation folder, overwriting the original `PPDM.zip` file. It is a good practice to create a backup copy of `PPDM.zip` before overwriting it with the modified content!
12. Install the PPDM application to the device using the Administration tool.

Getting access to log information depends on what logging method is specified. If the 6th **<argument>** is set to:

- **Telnet**
    - Launch HyperTerminal (or any other telnet client).
    - Create a new connection.
    - Select TCP/IP protocol.
    - Set the IP Address to that of the device.
    - Use the port number that was specified as the 7th **<argument>** in the `PPDM.DALP` file.
    - Launch the PPDM application on the device.
    - Connect through HyperTerminal.
    - Examine the log information in the terminal window.
- **File**
    - Launch Internet Explorer (or any other browser).
    - Enter the URL `http://<IP address>:<Port number>/`, where <IP address> is that of the device and <Port number> is the 7th **<argument>** in the `PPDM.DALP` file.
    - Download the log file.

- **Systemout**
  - Use the Remote Log Sender application to collect log information.

Typical errors

The following section presents typical error scenarios with suggestions on how to solve them.

`Error: The interactive installer alerts you that IIS is not installed.`

Description:

IIS is a prerequisite, but it is not found on the computer.

Solution:

Install IIS and restart the interactive installation.

`Error: Installation Order Conflict (.NET Framework 2.0 and IIS)`

Server Error in '/PPDM' Application.

The current identity (`<machine name>\ASPNET`) does not have write access to:

`C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727\Temporary ASP.NET Files`

or

`Failed to access IIS metabase`

Description:

If IIS is installed after the .NET 2.0 Framework installation, the framework registration into IIS is not performed correctly. In this case an additional manual registration step is needed to avoid the error message.

Solution:

`C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727>aspnet_regiis -i -enable`

`Error: installer error message`

Description:

The installer displays error messages if one of the installation prerequisites is missing, or if a virtual folder named PPDM already exists in Microsoft® Internet Information Service setup. List of errors:

Condition	Error message	Solution
AdminUser	Product installation requires administrator privileges.	Log in as an administrator to install the application.
Not Version9X	The application does not support Windows 9.x and Windows 2000 OS versions.	Install the application on a supported operating system with the latest service pack (see below).
PREREQ_DOTNET20_ INSTALLED = 1	Microsoft® .NET Framework Version 2.0 Redistributable Package is not installed.	Install this prerequisite.

PREREQ_IIS_ INSTAL-LEDONPORT80 = 1 or PREREQ_IIS_ INSTAL-LEDONPORT80 = 2	Installation checks if IIS is configured to listen at port 80.	To disable the check, use this command-line parameter: `PREREQ_IIS_INSTALLEDONPORT80`
VersionNT <> 501 or ServicePackLevel>=3	Service Pack 3 is not installed on Windows XP.	Install Service Pack 3 for Windows XP.
VersionNT <> 502 or ServicePackLevel>=2	Service Pack 2 is not installed on Windows 2003 Server.	Install Service Pack 2 for Windows 2003 Server.
VersionNT <> 600 or ServicePackLevel>=2	Service Pack 2 is not installed on Windows 2008 Server.	Install Service Pack 2 for Windows 2008 Server.
JavaVersionInstalled >= 1.5	Java Runtime Environment 1.5+ is not installed.	Install Java Runtime Environment 1.5 or later.
PREREQ_IIS_ INSTALLED=1	Microsoft® Internet Information Service is not installed.	Install IIS.
PREREQ_IIS_PATH_ OCCUPIED=0	A virtual folder named PPDM exists in Microsoft® Internet Information Service setup.	Remove this folder.

`Error: The Administration Tool does not display`

Description:

On launch, the following error message is displayed: `HTTP Error 404 - File or Directory not found.`

Solution:

You need to permit IIS to serve dynamic content. For guidelines on how to resolve this problem, see http://support.microsoft.com/kb/315122.

In addition to Active Server Pages, you also need to set ASP.NET to **Allow**.

`Error: Administration Tool action buttons do not work`

Description:

Such a situation may occur if Active Scripting is disabled in your Internet settings. On Windows Server 2003 or 2008, the default setting is **Disable**.

Solution:

Add the Administration Tool to the trusted zone,

or

Enable **Active Scripting**.

Using Internet Explorer under Windows Server 2003 or 2008, it implies the following steps:

1. Launch Internet Explorer.
2. Choose **Internet Options…** in the **Tools** menu.
3. Go to the **Security** tab .
4. Select **Zones** > **Internet**.

5. Click the **Custom Level…** button.
6. Choose **Scripting** > **Active scripting** and select the radio button **Enable**.

Error: Status warnings in the Managed Devices table (Devices panel of the Administration Tool).

If the application is unable to communicate with the device properly, the **Status** column displays question marks and/or error signals.

Solutions in possible scenarios:

The second and third icons are question marks: check if **Extended Feature** dialog can be accessed through device LCD display. Install ESA Java™ Platform.

Error: The second status indicator in the Administration Tool displays a negative mark (instead of a check mark) after a successful installation.

Description:

This display glitch (a known issue) may occur when PPDM is installed on some more recent device models.

Solution:

PPDM functionality is not affected; therefore no user or administrator action is required.

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NETWORK INSTALLATION GUIDE

Personal Paperless
Document Manager

Personal Paperless Document Manager v2

Network Installation Guide

Document version 1.0

This document provides instructions for installing the software associated with Personal Paperless Document Manager v2 in a network environment.

Note:
Personal Paperless Document Manager products, including PPDM OCR Module, PPDM Desktop Module, PPDM PDF Converter Module and DesktopDeliveryPSP are translated into English, French, Italian, German, Spanish and Brazilian Portuguese. These products are designed to work with an operating system that is properly configured with the corresponding language. Use of these products with operating systems that are configured with non-supported languages is not recommended or supported.

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Personal Paperless Document Manager v2 Network Installation Guide

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Introduction

This guide provides instructions for installing the software associated with Personal Paperless Document Manager v2 in a network environment.

Personal Paperless Document Manager v2 is referred to as PPDMv2 in this document.

Targeted users are administrators, Information Technology specialists or programmers who set up or perform network installations. It assumes the reader is familiar with Microsoft Windows 2003/2008 Server with Active Directory, in addition to program package setup, advertising and distribution.

Network installation enables a network administrator to manage and distribute software applications without the need to visit each client system.

The target client machines include Windows XP SP3, Windows Vista SP2 and Windows 7. Both 32-bit and 64-bit operating systems are supported.

If you are upgrading and you have any previous versions of the PPDM software components on client systems, uninstall them first and proceed with the installation only after that.

In the installation sequence, administrative images of the applications (the PPDMv2 components) should be created on the server first. Then the server must be configured to automatically distribute the created administrative images to client computers.

Software components

Software components of the PPDM v2 CD-ROM

	Software component
1	PPDM Desktop Module 12
2	PPDM OCR Module 17
3	PPDM PDF Converter Module 7
4	DesktopDeliveryPSP 10
5	PaperPort Image Printer
6	RealSpeak Solo

Any combination of these products on the CD-ROM can be installed under the following limitations:

1. To ensure full functionality of PPDM Desktop Module 12, PaperPort Image Printer must also be installed.
2. To ensure full functionality of PPDM Desktop Module 12 and PPDM OCR Module 17, PPDM PDF Converter Module 7 must also be installed.
3. To ensure full functionality of PPDM OCR Module 17 and PPDM PDF Converter Module 7, RealSpeak Solo must also be installed.
4. To install DesktopDeliveryPSP 10, you must install PPDM Desktop Module 12 first.

These components require the presence of certain system components also referred to as Prerequisites. These are the Microsoft Visual C++ 2005 and 2008 Redistributables and the MS XML4 SP3 Parser.

Note that the PaperPort Image Printer and the PPDM PDF Converter Module 7 components have both a 32-bit and a 64-bit version.

Important!

PPDM Desktop Module 12, PPDM OCR Module 17, and PPDM PDF Converter Module 7 are copy protected components and require activation on the client machines after installation.

Creating administrative images

To distribute the software components of PPDMv2, the administrative images of the components should be created in a shared network folder on the publishing server first.

The administrative installation does not install any program files, instead it creates an administrative image by extracting the necessary files into a network location specified during the installation. This location is also known as a Distribution Point.

To create an administrative image for components:

1. Create a shared network folder where you put the administrative images (`.msi` files) you want to distribute.
2. Set permissions on the share to allow access to the administrative images.
3. Use the table below to locate components and their installer on the PPDMv2 CD-ROM.
4. Run the administrative installation (`SETUP /a`) of each component you want to install to copy the files to the distribution point.
5. During the administrative installation, specify a target folder for the administrative image.
6. During the administrative installation of the PPDM Desktop Module 12, the PPDM OCR Module 17, and the PPDM PDF Converter Module 7 you will be asked to enter the serial number, and an `admin.mst` transform file is created containing this serial number. Use this `admin.mst` file together with the `.msi` file for installation from the distribution point.
   Note that these components require product activation on the client machine.
7. During the administrative installation, `<LANGID>.mst` language transform files are created (if applicable). Use the table below to find the appropriate `<LANGID>.mst` file and use it together with the `.msi` file for installation from the distribution point.

Software components and their installer locations

	Software component	Installer location on the PPDMv2 CD-ROM
1	PPDM Desktop Module 12	PPDM Desktop Module 12
2	PPDM OCR Module 17	PPDM OCR Module 17
3	PPDM PDF Converter Module 7	PPDM PDF Converter Module 7
4	DesktopDeliveryPSP 10	PPDM DesktopDeliveryPSP 10
5	PaperPort Image Printer	PPImgPrinter
6	RealSpeak Solo	RealSpeakSOLO

Note:

PPDM PDF Converter Module 7 and PaperPort Image Printer have 32- and 64-bit versions. They are located at the folders `<System32 or System64>`, respectively. Use the ones appropriate for your target operating system.

Language transform files

Language transform file	Language
1033.mst	English
1036.mst	French
1034.mst	Spanish
1046.mst	Brazilian Portuguese
1040.mst	Italian
1031.mst	German

Creating administrative images for the prerequisites

The software components of PPDMv2 require the presence of certain system components, also referred to as Prerequisites.

These prerequisites are the Microsoft Visual C++ 2005 and 2008 Redistributables and the MS XML 4 SP3 Parser. You can find them on the PPDMv2 CD-ROM under the **Prerequisite** folder (the 64-bit components are located under the **System64** subfolder).

Microsoft Visual C++ 2005 Redistributable

32-bit systems:

1. Run `vcredist_x86.exe /t:"<full_path32>" /c` to copy the files to the distribution point.
2. Use the unpacked `vcredist.msi` for product distribution.

64-bit systems:

1. Complete the installation of `vcredist_x86.exe` as described in the previous step, then repeat it for the 64-bit component.
2. To do this, run `vcredist_x64.exe /t:"<full_path64>" /c`.

Microsoft Visual C++ 2008 Redistributable

32-bit systems

1. Run `vcredist9_x86.exe /a` to copy the files to the distribution point.
2. Use the unpacked `VC_RED.MSI` for product installation.

64-bit systems

1. Complete the installation of `vcredist9_x86.exe` as described in the previous step, then repeat it for the 64-bit component.
2. To do this, run `vcredist9_x64.exe /a`.

MSXML 4.0 Parser

Copy the `Msxml4-SP3.msi` file as administrative image to the distribution point.

Installation order

Before starting to install any component of PPDMv2, ensure that the relevant prerequisites are installed on the target computer.

Once the redistributable packages are installed, the different components can be installed in any combination.

Preferred installation order of components

	Software component	Installer
1	Microsoft Visual C++ 2005 and 2008 Redistributables	vcredist.msi, VC_RED.MSI
2	MSXML4-SP3 Parser	Msxml4-SP3.msi
3	PPDM Desktop Module 12	PPDM Desktop Module 12.msi
4	PPDM OCR Module 17	PPDM OCR Module 17.msi
5	DesktopDeliveryPSP 10	DesktopDeliveryPSP.msi
6	PaperPort Image Printer	PaperPort Image Printer.msi or PaperPort Image Printer-64bit.msi
7	PPDM PDF Converter Module 7	PPDM PDF Converter Module 7.msi
8	RealSpeak Solo	RSSolo.msi

Distributing administrative images - Active Directory

Active Directory is a feature of Windows Server. Group Policy, a component of Active Directory enables an administrator to automatically distribute programs (administrative images) to client computers or users.

There are three methods to distribute programs by Group Policy:

- **Publish to Users**,
- **Assign to Users**, and
- **Assign to Computers**.

The software components of PPDMv2 support the **Assign to Computers** method only. If you assign the program to a computer, it is installed when the computer starts, and it is available to all users who log on to the computer.

To automatically assign the administrative images of the software components of PPDMv2 to client computers using Group Policy, see the following Microsoft Knowledge Base article:

816102 HOW TO: Use Group Policy to Remotely Install Software in Windows Server 2003 and in Windows Server 2008.

Distributing administrative images - The Command Line and msiexec

You can install the administrative images of the software components of PPDMv2 to client computers using command line and Microsoft Installer (MSI) commands.

If the installer of any software component supports more than one UI languages, and a non-English installation is needed, one of the language transform files must also be specified in the command line (presented as `<LANGID.mst>` here). For example, to specify a German installation, use the following transforms tag: `TRANSFORMS="1031.mst"`.

Note:

For more information on the `TRANSFORMS` parameter, see here.

For more information on the `ALLUSERS` parameter, see here.

The `admin.mst` transform file is required for the command lines of the PPDM Desktop Module 12, PPDM OCR Module 17, and PPDM PDF Converter Module 7.

- To install PPDM Desktop Module 12, use the following command line:
  ```
  MSIEXEC /i "PPDM Desktop Module 12.msi" TRANSFORMS=admin.mst;<LANGID.mst>
  ALLUSERS=<depending on your environment> /qn
  ```
- To install PPDM OCR Module 17, use the following command line:
  ```
  MSIEXEC /i "PPDM OCR Module 17.msi" TRANSFORMS=admin.mst;<LANGID.mst>
  ALLUSERS=<depending on your environment> /qn
  ```
- To install DesktopDeliveryPSP 10, use the following command line:
  ```
  MSIEXEC /i "DesktopDeliveryPSP.msi" TRANSFORMS=<LANGID.mst> ALLUSERS=<depending
  on your environment> [<other_install_params>] /qn
  ```
  Where the optional `<other_install_params>` parameters can be used to customize DesktopDeliveryPSP at its install time. For a more detailed list of the optional parameters, see the **Customized Install** section of the **DesktopDeliveryPSP Guide**.
- To install the PaperPort Image Printer, use the following command line:
  ```
  MSIEXEC /i "PaperPort Image Printer.msi" ALLUSERS=<depending on your
  environment> TRANSFORMS=<LANGID.mst> /qn
  ```
- To install PPDM PDF Converter Module 7, use the following command line:
  ```
  MSIEXEC /i "PPDM PDF Converter Module 7.msi" TRANSFORMS=admin.mst;<LANGID.mst>
  ALLUSERS=<depending on your environment> /qn
  ```
- To install RealSpeak Solo, use the following command line:
  ```
  MSIEXEC /i "RSSolo.msi" ALLUSERS=<depending on your environment> /qn
  ```

Removing installed components

To automatically remove installed software components of PPDMv2 from client computers using Group Policy, see the following Microsoft Knowledge Base article:

816102 HOW TO: Use Group Policy to Remotely Install Software in Windows Server 2003 and in Windows Server 2008.

To remove installed software components using Microsoft Installer (MSI), use the following command line:

```
msiexec /x <Product Code> /qn
```

Where the `<Product Code>` of PPDMv2 software components are the following:

Common in all releases

Software component	Product Code
DesktopDeliveryPSP 10	{D870CDB7-4449-4E77-A956-C2B2B21828BA}
PaperPort Image Printer (32-bit)	{6EF2FDAB-7FBF-4AB9-92CD-594BDDB6A56B}
PaperPort Image Printer (64-bit)	{715CAACC-579B-4831-A5F4-A83A8DE3EFE2}
RealSpeak Solo	{4CCBA8CA-4819-4C09-A2FA-42CD5168AEC7}

English-only release

Software component	Product Code
PPDM Desktop Module 12	{705FEB18-CE5F-4F9B-AC95-984AF3A0146E}
PPDM OCR Module 17	{22255452-EA70-4912-AD18-1DA9AE412D1B}
PPDM PDF Converter Module 7 (32-bit)	{9CE191C4-B9E0-4FE5-B66E-17883C4E4E29}
PPDM PDF Converter Module 7 (64-bit)	{AC054B17-81B4-486F-8137-E421635ED8A4}

French and Spanish releases

Software component	Product Code
PPDM Desktop Module 12	{37A9D163-474F-423F-867F-0D1AA9016578}
PPDM OCR Module 17	{501B04B9-7922-4F9A-99EB-FDAC4065CFF8}
PPDM PDF Converter Module 7 (32-bit)	{BD9C72BC-9786-4CF2-81ED-CD359F2AAC47}
PPDM PDF Converter Module 7 (64-bit)	{C6303194-2687-4469-875E-D775689FF2EC}

Brazilian Portuguese, Italian, and German release

Software component	Product Code
PPDM Desktop Module 12	{C88E603C-62B8-48C5-8CD1-745C5E8F4294}
PPDM OCR Module 17	{A279B88C-D331-4694-87F5-34E513408257}
PPDM PDF Converter Module 7 (32-bit)	{DB57AFDA-D6AB-4E44-A764-E40D3BA30EEE}
PPDM PDF Converter Module 7 (64-bit)	{EC85B042-A061-4ABC-9351-E45EFD616513}

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Windows Authentication Service Installation and Configuration Guide

Introduction

Windows Authorization Service Function

When properly configured and functioning the Windows Authentication Service will lock the entire MFP so that it can not be accessed until a user name and password has been entered via the MFP panel. User names and passwords are verified against the authorization server and subsequently grant access to the MFP Panel. See p. 13 for authentication server configuration settings. Please note that authorization settings will only affect new users. Existing users in the system's address book will retain their existing functionality privileges.

Authenticated users are granted access rights based on the configuration settings in the Machine Management configuration settings. See screen shot on p. 7. Selected functions are available to users and unselected functions will display an unauthorized dialog screen when a user attempts to access them.

Supported MFP Authorization Types

The Windows Authorization Service function supports windows authentication and active directory authentication (with and without Kerberos). Please see the following table for the types of MFP authorization that the Windows Authentication Service supports.

MFP Authorization	note	Windows Authentication Support
User Code Auth	Locks the whole MFP with a single code	Not Supported
Basic Auth	Users are stored on the MFP	Not Supported
Windows Auth	NTLM	Supported
LDAP Auth	Active Directory with and without Kerberos	Supported
Integration Server Auth		Not Supported

Install / Configuration Overview

To Install the Windows Authentication Service, first insure that the Java Platform is installed followed by the activation of the SDK Certification Device service on the MFP via the Service Mode. The MFP should then be configured with authentication settings followed by the final step of installing and configuring the Windows Authentication Service. These steps are described in detail in the following sections of this document.

Installation Requirements

Supported Devices

This is a partial listing. Refer to the PPDM v2 Product Support Guide and TSRC website (www.tscweb.net) for current MFP supported devices.

Java CVM 4.x:

Model
Aficio MP 4000/5000
Aficio MP 2550/3350
Aficio MP C6000/C7500

Java CVM 2.x:

Model
Aficio MP C3500/C4500
Aficio MP C2500/C3000/C2000
Aficio MP 9000/1100/1350
Aficio MP Pro 906EX/Pro 1106EX/Pro 1356EX
Aficio MP 5500/6500/7500
Aficio MP 6000/7000/8000

Server:

Model	Version
Windows 2003 Server	standard

Installing the Java Platform

1. Power Off the machine
2. Insert **Java CVM card** described in the previous section into Slot 3 of the machine.
3. Power On the machine
4. Wait 5 minutes for all the components to be automatically installed
5. Power-cycle the MFP, wait another 5 minutes for all the modules to be loaded
6. Press 'User Tool' , then press 'Extended Feature Settings' to verify the following components are installed and running correctly:

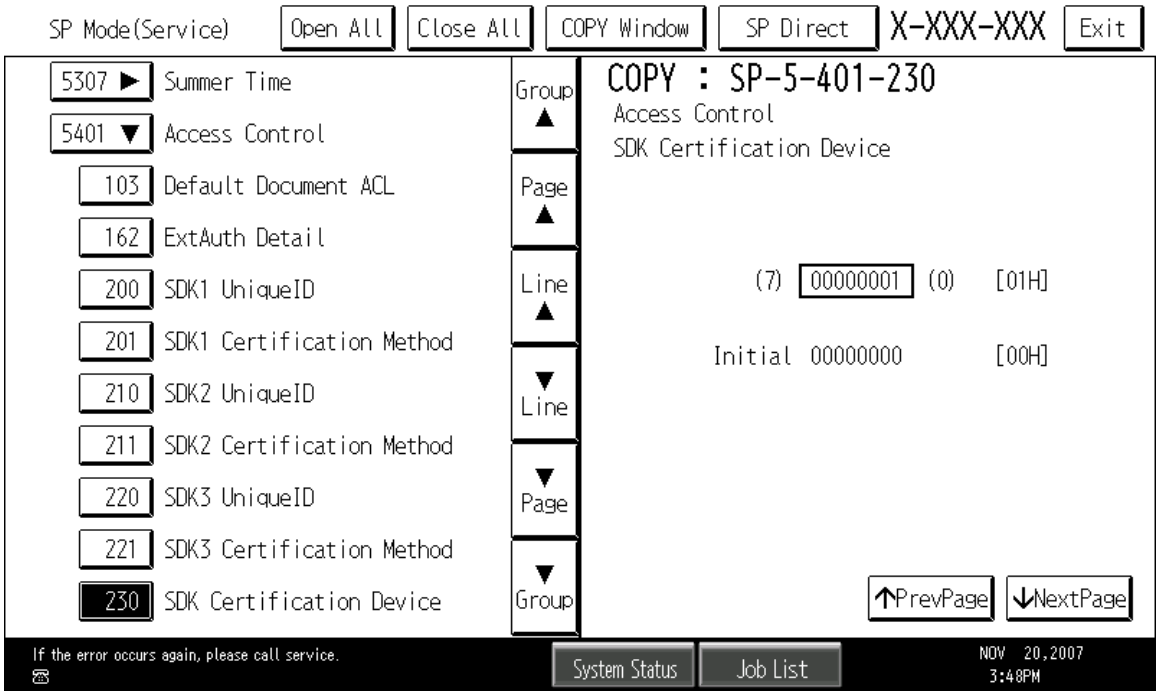
The auto installed components are:

JavaTM Platform

Service Mode Settings

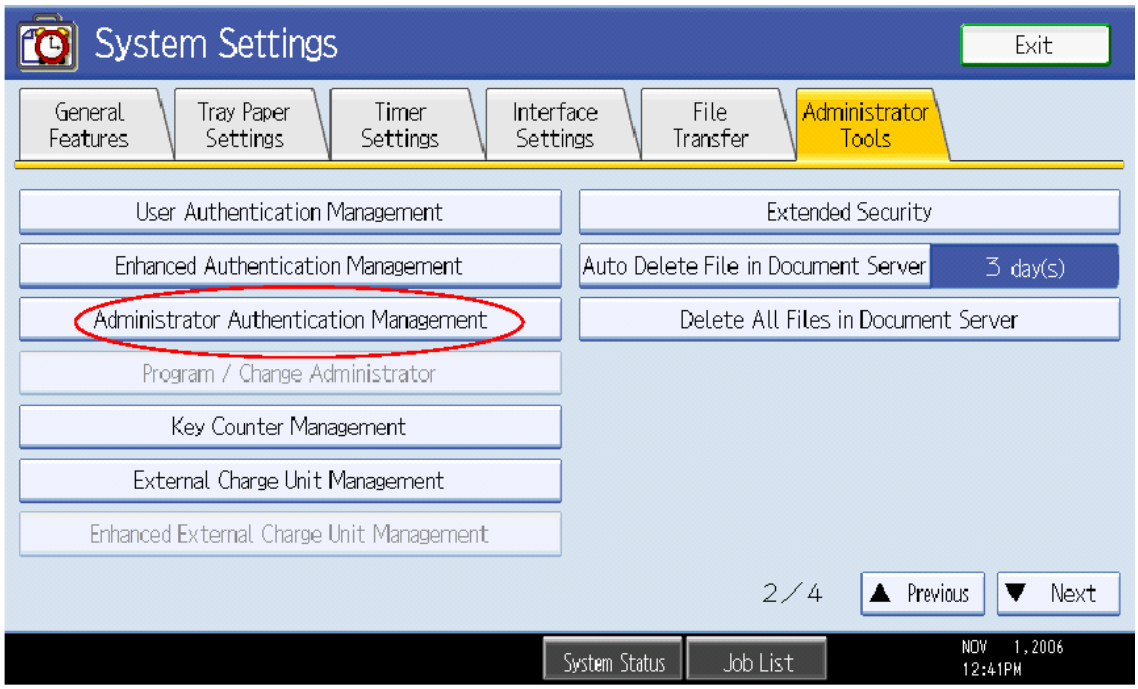
Enter Service Mode of the machine

1. Press ‘Clear Mode’
2. Press 107 [Number keys ‘1’, ‘0’, ‘7’]
3. Hold ‘Clear Stop’ till Operation Panel shows Service Mode Screen.
4. press the # Hard Key and Copy SP Soft Key to Enter SP Mode
5. The service code to modify is 5401-230
6. change the value to 0 by pressing the 230 Soft Key



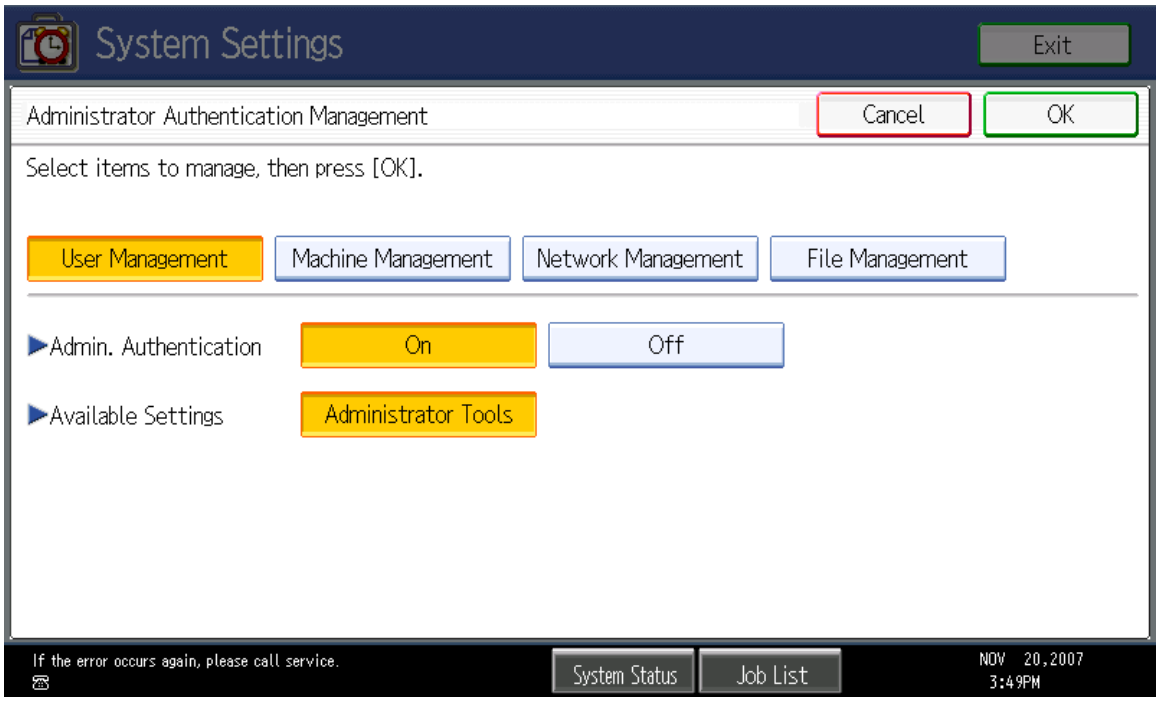
MFP System Settings

1. Press ‘User Tools’ Hard Key
2. Press ‘System Settings’ Soft key
3. Press ‘Administrator Tools’
4. Press ‘Administrator Authentication Management’

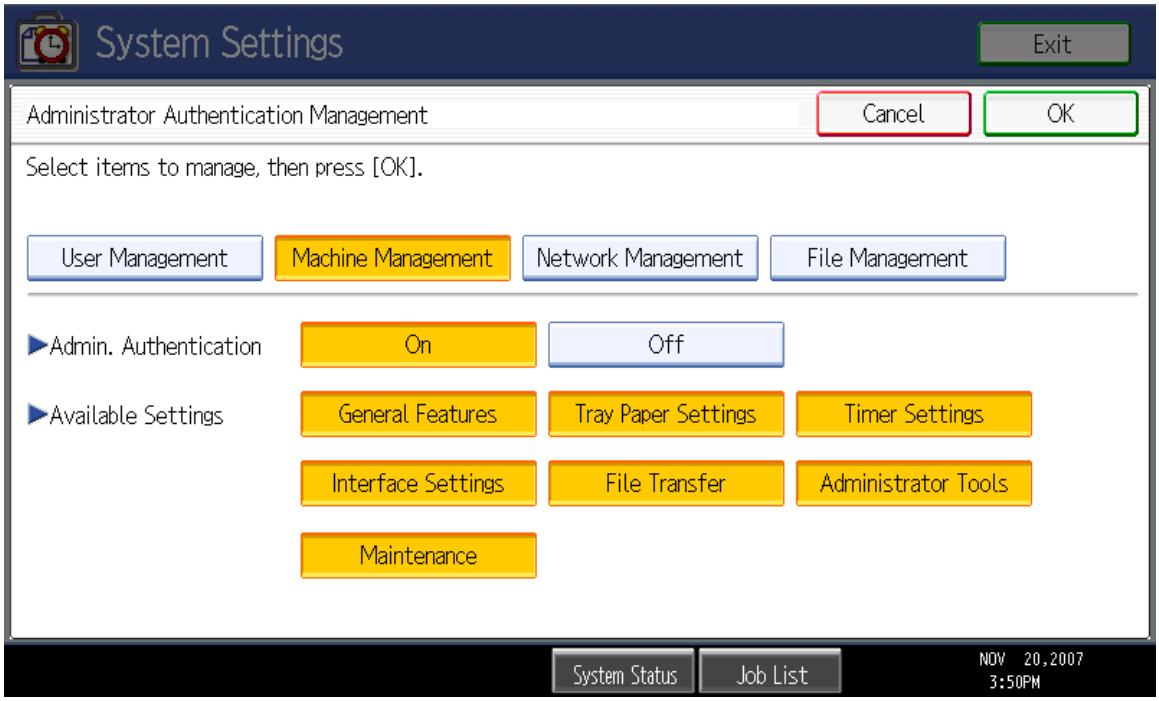


Select ‘Admin Authentication’ to ‘On’ & Select all ‘Available Settings’ in each screen

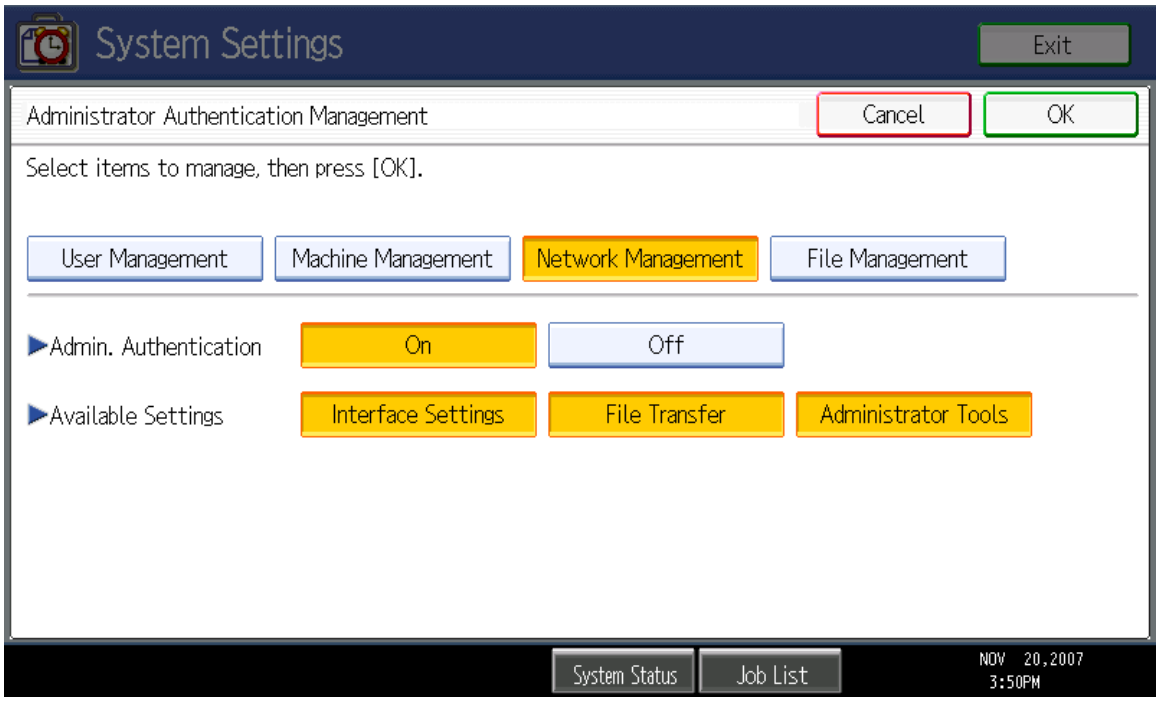
A. User Management



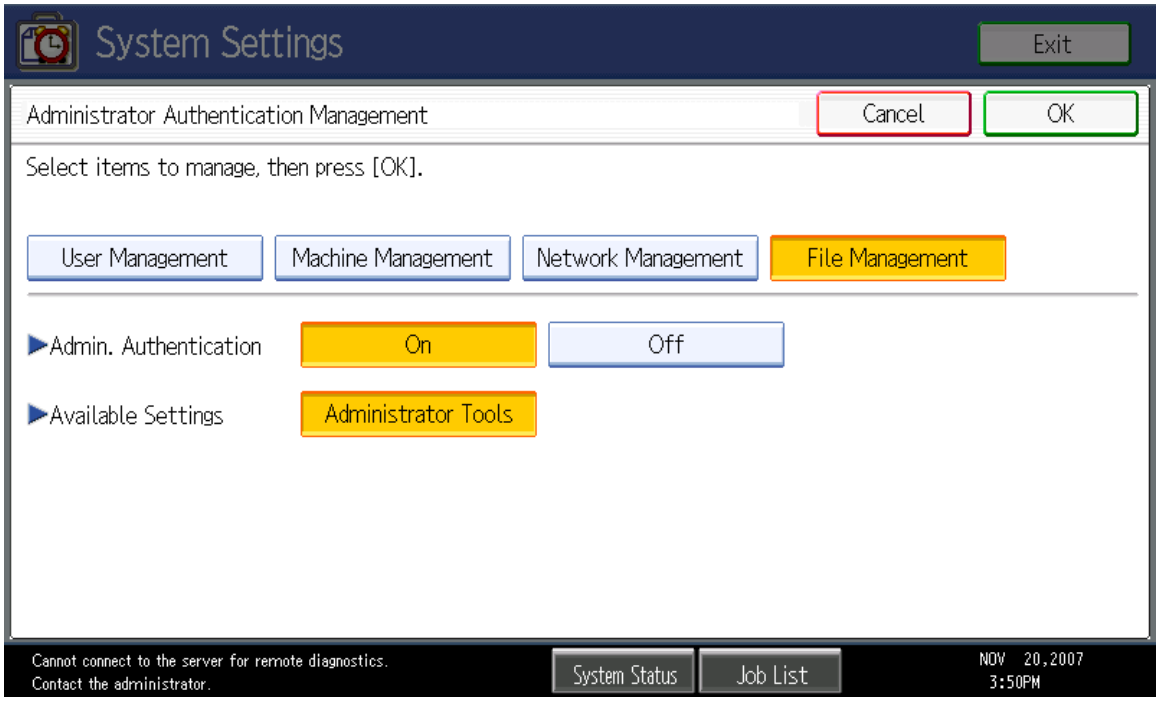
B. Machine Management



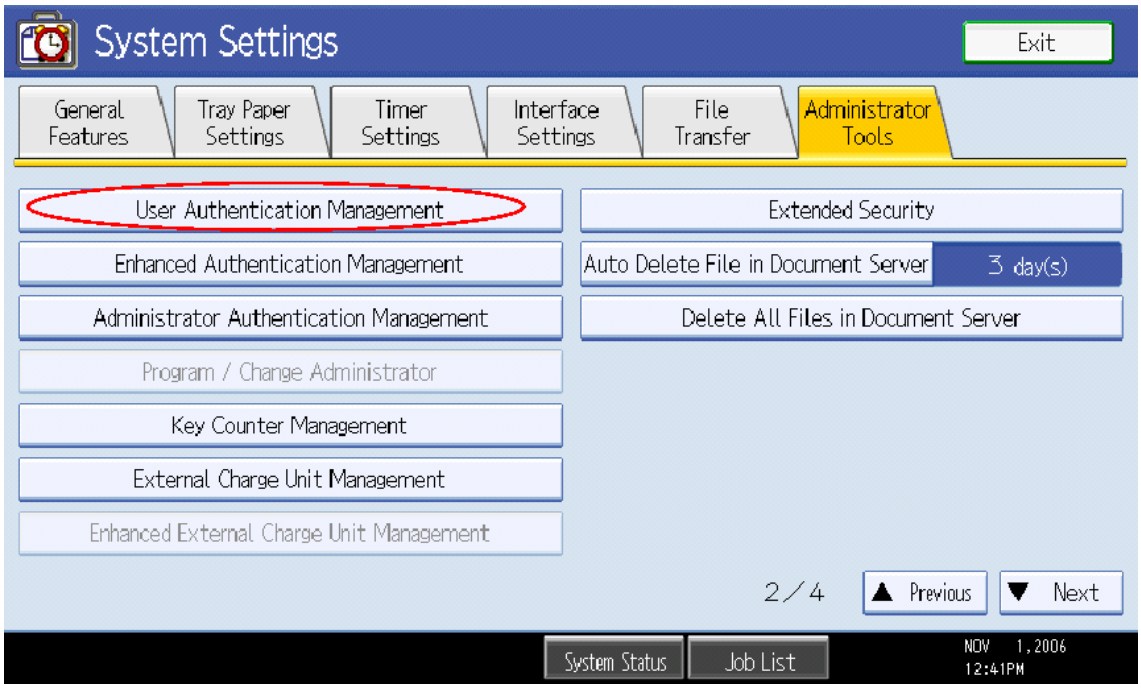
C. Network Management



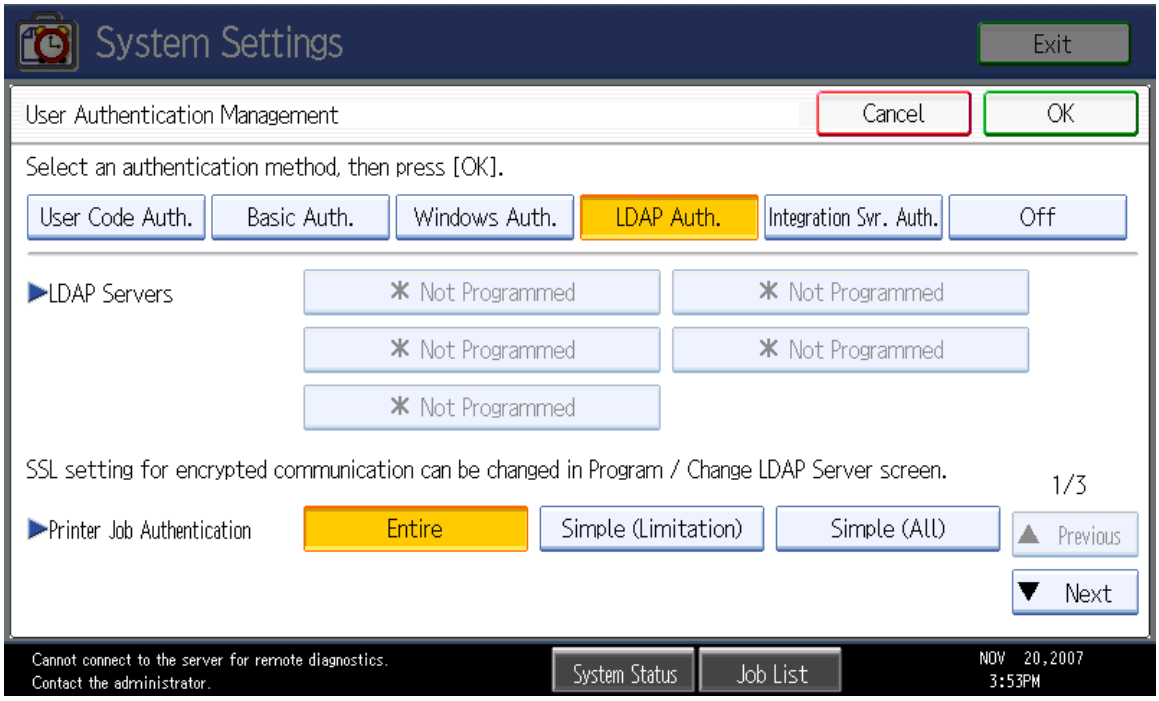
D. File Management



5. Press 'User Authentication Management' from 'System Settings' screen.



6. Select 'LDAP Auth'



IMPORTANT: The Windows Authentication Service will provide Windows authentication; however, you must select « LDAP Auth » on the MFP to configure the internal login manager.

9. Exit from ‘User Tools’, after pressing ‘Ok’.

10. Power Cycle the machine [Wait for 5 Minutes for the machine to be ready to use]

Windows Authentication Service Install and Configuration

Pre Conditions

- Active Directory and Kerberos should be setup and working per Microsoft documentation.
- The MFP must be configured with the authentication settings described in the above section
- Please uninstall any existing previous versions of the Windows Authentication Service before any re-installation attempts. Re-installing over an existing installation will fail.
- Any install of the Windows Authentication Service using Web Image Monitor must be performed on the Internet Explorer browser. The Fierefox browser will not be able to upload the servlets to the MFP.

Installation using Web Image Monitor

After the MFP has been configured the installation of the Windows Authentication Service will begin with the install of rxconf component followed by the Windows Authenticator component. Please note that the rxconf component must be installed before the windows authenticator component.

Rxconf

1. Log into the MFP's Web Image Monitor's Interface as the Administrator.
2. Click on the **Configuration** link from the Left Navigation Bar to display the Configuration page
3. Click on the **Install** link under the Extended Feature Settings section
4. Select the **Local File** radio button and click on the **Browse** button to display the Choose File window
5. Navigate to the location where the **Ricoh_Americas_Corporation_rxconfServlet-2.x.x.zip** file is, select it and click on the **Open** button
6. Click on the **Display Extended Feature List** button
7. Select the **Device HDD** option in the "Install to" drop down menu under the Installation Target Setting section
8. Set the Auto Start radio button to the **On** position
9. Select the radio button for the **Configurator** application in the Extended Features List section
10. Click the **Install** link to install the application

11. Click **OK** on the confirmation page to confirm the installation
12. Navigate back to the Configuration page and select the **Startup Setting** link under the Extended Feature Settings section
13. Verify that the **Configurator** application is in the applications list and select it using the radio button
14. With the application selected via the radio button click the **Start Up/Stop** button to start the application
15. Verify the application has started up in the **Status** column of the applications list - the status should display the text Starting Up
16. Continue the installation process by installing the Windows Authenticator component outlined in the next section

Windows Authenticator

1. Navigate back to the **Configuration** page to begin the Windows Authenticator installation
2. Click on the **Install** link under the Extended Feature Settings section
3. Select the **Local File** radio button and click on the **Browse** button to display the Choose File window.
4. Navigate to the location where the **Ricoh_Americas_Corporation_WindowsAuthenticator-1.x.zip** file is, select it and click on the **Open** button.
5. Click on the **Display Extended Feature List** button
6. Select the **Device HDD** option in the "Install to" drop down menu under the Installation Target Setting section
7. Set the Auto Start radio button to the **On** position
8. Select the radio button for the **WindowsAuthenticator** application in the Extended Features List section
9. Click the **Install** link to install the application
10. Click **OK** on the confirmation page to confirm the installation
11. Navigate back to the Configuration page and select the **Startup Setting** link under the Extended Feature Settings section
12. Verify that the **WindowsAuthenticator** application is in the applications list and select it using the radio button
13. With the application selected via the radio button click the **Start Up/Stop** button to start the application
14. Verify the application has started up in the **Status** column of the applications list – the status should display the text Starting Up
15. Continue to configure the servlets as outlined in the **Configuration** section

Configuration

If you wish to use Simple Authentication please follow the Simple Authentication steps outlined below. For Kerberos Authentication follow the Kerberos configuration steps.

Windows Authentication (NTLM)

1. Open a browser and load **http://<ip address>:8080/aaa**
2. Allow 2-3 minutes for the page to display
3. Select the **Windows Authentication (NTLM)** radio option
4. Enter the host name in the **Host** text field
5. Enter the Domain name in the **Domain** field
6. Enter the MFP Admin password in the **MFP Admin password** text field and click the Set Authentication Settings button – note that the default admin password on MFP's is "**ricoh**" if it has not already been set
7. Close the browser

Active Directory with Simple Authentication (LDAP)

1. Open a browser and load **http://<ip address>:8080/aaa**
2. Allow 2-3 minutes for the page to display
3. Select the **Active Directory with Simple Authentication (LDAP)** radio option
4. Enter the host name in the **Host** text field
5. Enter the Domain name in the **Domain** field
6. Enter the MFP Admin password in the **MFP Admin password** text field and click the Set Authentication Settings button – note that the default admin password on MFP's is "**ricoh**" if it has not already been set
7. Close the browser

Active Directory with Kerberos Authentication (Kerberos + LDAP)

1. Open a browser and load **http://<ip address>:8080/aaa**
2. Allow 2-3 minutes for the page to display
3. Select the **Active Directory with Kerberos Authentication (Kerberos + LDAP)** radio option
4. Enter a kdc value in the **Key Distribution Center**: text field
5. Enter the realm in the **Realm**: text field
6. Enter the MFP Admin password in the **MFP Admin password** text field and click the Set Authentication Settings button – note that the default admin password on MFP's is "**ricoh**" if it has not already been set

7. Close the browser

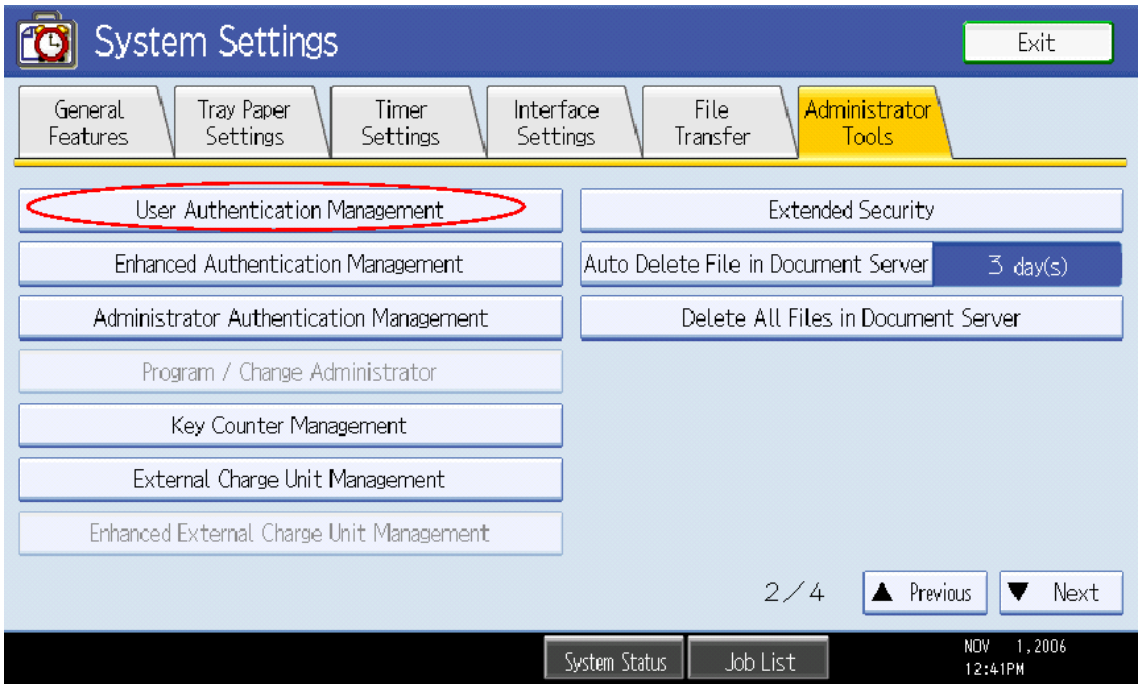
Un-installation of the Windows Authentication Service

The uninstall procedure begins with stopping the components if they are running and removing them from the MFP. Please note that the windows authenticator must be removed before rxconf.

1. Log into the MFP's Web Image Monitor's Interface as the Administrator.
2. Click on the **Configuration** link from the Left Navigation Bar to display the Configuration page
3. Click on the **Startup Setting** link under the Extended Feature Settings section
4. Select the radio button for the **WindowsAuthenticator** application in the Extended Features List section and click the **Start Up/Stop** button to stop the application
5. Navigate back to the **Configuration** Page and click on the **Uninstall** link under the Extended Feature Settings section
6. Select the radio button for the **WindowsAuthenticator** application in the Extended Features List section and click the **Uninstall** button
7. Navigate back to the **Configuration** Page and click on the **Startup Setting** link under the Extended Feature Settings section
8. Select the radio button for the **Configurator** application in the Extended Features List section and click the **Start Up/Stop** button to stop the application
9. Navigate back to the **Configuration** Page and click on the **Uninstall** link under the Extended Feature Settings section
10. Select the radio button for the **Configurator** application in the Extended Features List section and click the **Uninstall** button
11. Navigate back to the **Configuration** Page and click on the **Home** link in the top left navigation menu
12. Click on the **Reset device** to restart the MFP

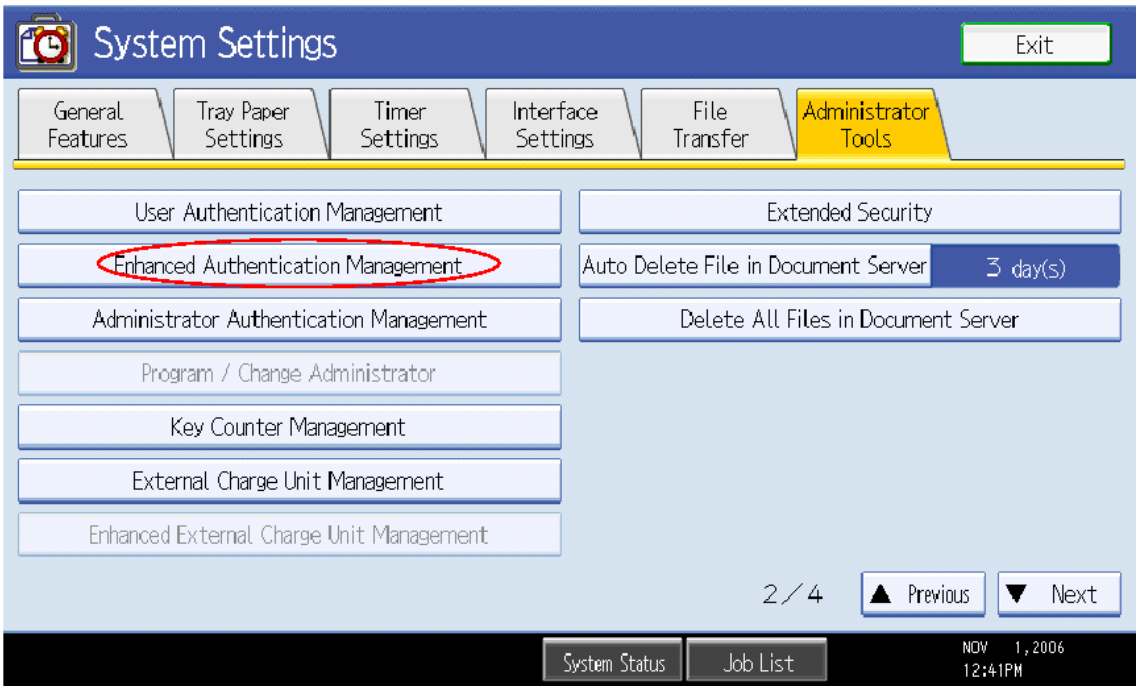
Un-installation of the Java Platform

1. Press ‘User Tools’ Hard Key
2. Press ‘System Settings’ Soft key
3. Press ‘Administrator Tools’
4. Press ‘Administrator Authentication Management’
5. Press ‘User Authentication Management’ from ‘System Settings’ screen.



6. Select “Off”

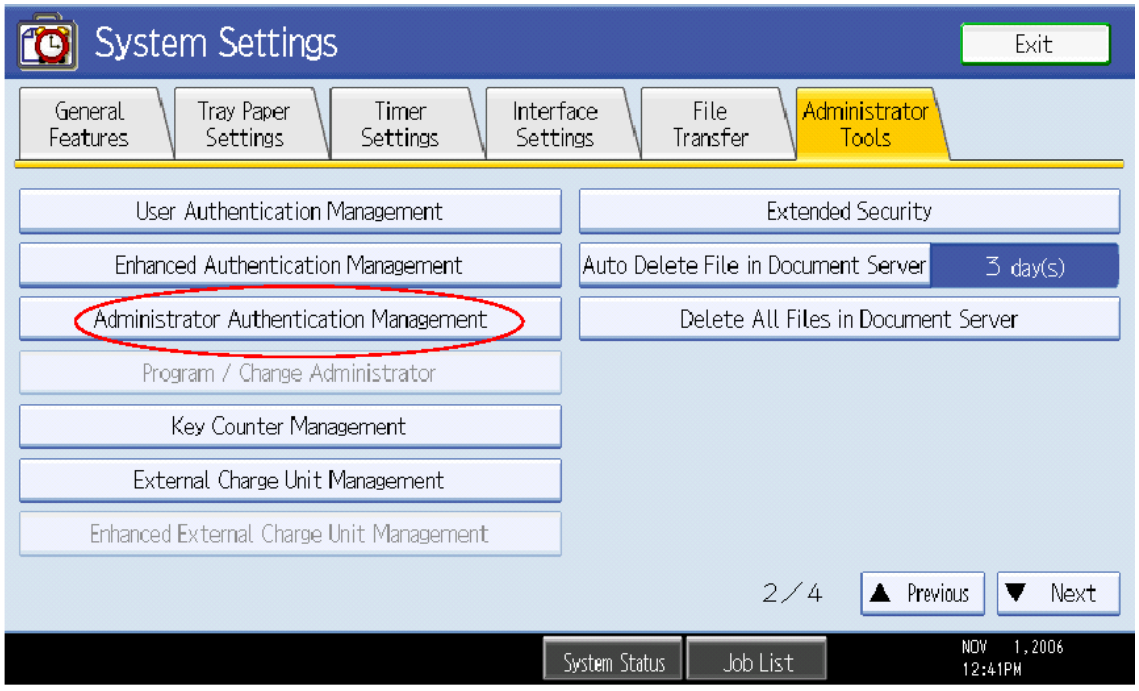
7. Press 'Enhanced Authentication Management' from 'System Settings' screen.



8. Select "Off"

Note: Should not be necessary, as you should not have turned on enhanced Authentication management during installation.

9. Press 'Administrator Authentication Management' from 'System Settings' screen.



10. Select "Off" to all the management options

11. Exit from ‘User Tools’, after pressing ‘Ok’.

12. Press ‘User Tool’ , then press ‘Extended Feature Settings’

13. Press ‘Uninstall’ , then press each of the following components and follows the on-screen instructions to uninstall (no need to reboot MFP in between):

    JavaTM Platform

14. After un-install all the above components, power off the MFP

15. Remove SD card

16. Power on MFP

Troubleshooting

General

- **MFP Network Settings, IP Address, Mask, Gateway and DNS Settings need to be configured correctly**

Active Directory with Kerberos Authentication

- **There can not be more than a five minute time difference between the KDC server (win 2003) and the client (MFP) and the both need to be configured to have the same time zone**

- **A reverse lookup entry must exist on DNS for the KDC server**

Personal Paperless Document Manager v2

DesktopDeliveryPSP

About this product

Personal Paperless Document Manager v2 includes DesktopDeliveryPSP, which is designed to work in any combination of the following ways:

- It can monitor a specified folder on a networked file server or local drive for incoming scanned images and transfer them to your local PaperPort Desktop.
- It can monitor email inboxes for attachments
- It can receive files from select Multifunction Printer/Copiers using the PSP Server for Personalized MFP Scanning functionality.

After you install the Personal Paperless Document Manager v2 family of software components, including DesktopDeliveryPSP, you must restart your computer. When you do, DesktopDeliveryPSP is displayed with an icon in the system tray on the Windows task bar. To properly use the product, however, it has to be configured and enabled after installation and restart.

The icon has indicator lights at the bottom, representing the status of email polling, folder watching and Personalized MFP Scanning by means of different colors: dark green - monitoring; light green - processing; grey - inactive; red - error.

Right-click on the DesktopDeliveryPSP icon in the Windows system tray to display the DesktopDeliveryPSP menu with the following commands:

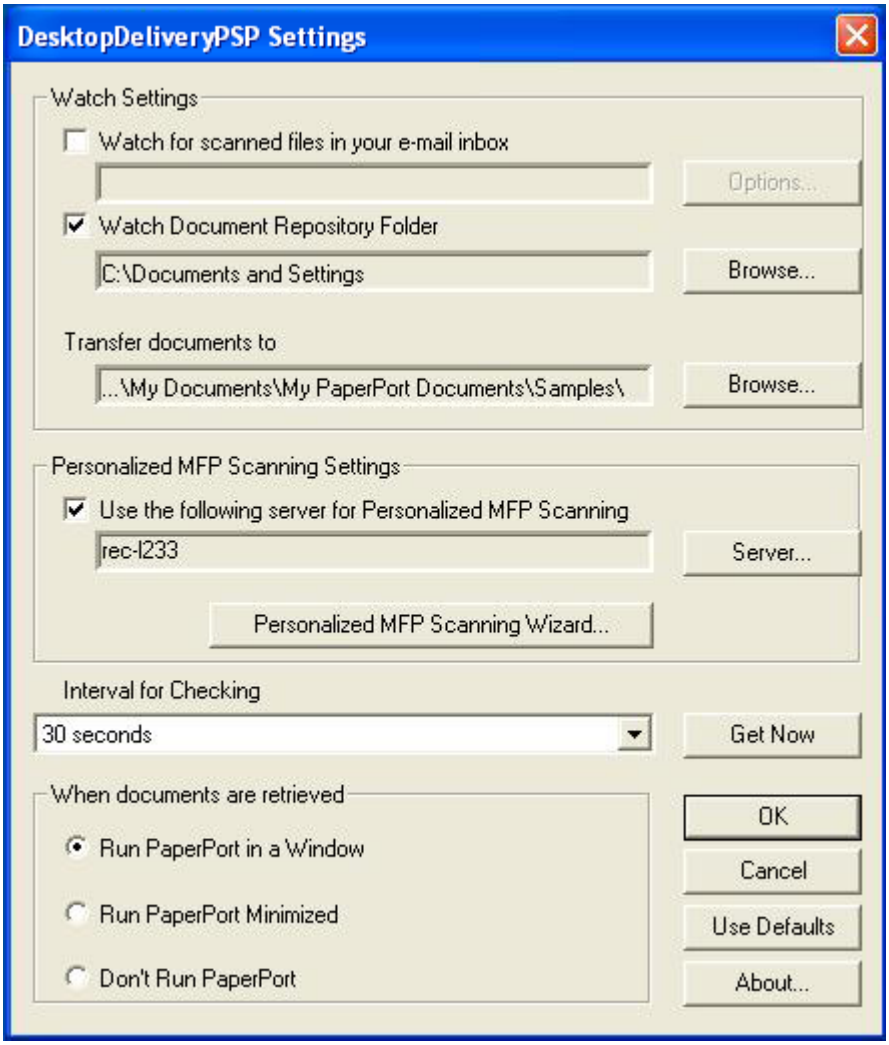
- Get Now
- Use Defaults
- Refresh Defaults
- Settings
- View Log
- About
- Close

Settings command

Before using DesktopDeliveryPSP it has to be configured through the "DesktopDeliveryPSP Settings" dialog.

Once you have installed the program it starts up along with your PC and resides in the system tray.

To configure DesktopDeliveryPSP right-click the DesktopDeliveryPSP icon to display its menu. Then click the **Settings** command to display a dialog box of all the DesktopDeliveryPSP controls:



E-mail Polling

This feature of DesktopDeliveryPSP lets you monitor your Microsoft Outlook or Lotus Notes inbox for new messages with attached PDF or TIFF files. Disable the feature if you do not want to monitor your email. Use the following controls to configure email polling of DesktopDeliveryPSP.

Watch for scanned files in your email inbox

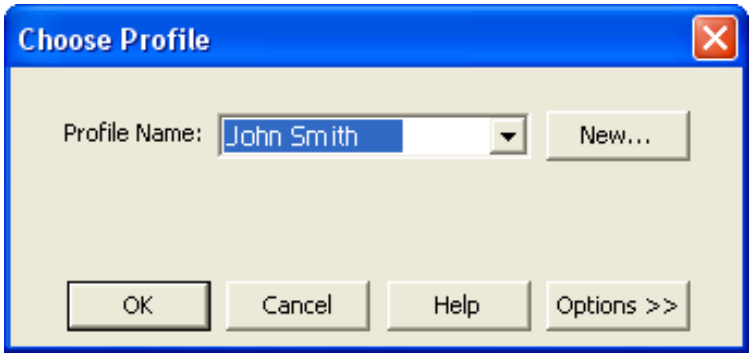
Click this checkbox to enable email polling.

Options button

Click the **Options...** button to change your current email polling configuration.

If you have both Microsoft Outlook and Lotus Notes installed on your system, the following dialog box is displayed, enabling you to choose between the two mail clients. Click **OK** to confirm your choice, or **Cancel** to close the dialog.

In case of Microsoft Outlook, the **Choose Profile** dialog box displays, enabling you to choose the Microsoft Outlook profile whose inbox you want DesktopDeliveryPSP to monitor. Select your Microsoft Outlook profile and click **OK**.



In the **DesktopDeliveryPSP Settings** dialog, you will see your Microsoft Outlook profile name displayed in the relevant field.

For Microsoft Outlook Users:

Microsoft Outlook 2003 and 2007 users cannot enable email monitoring or choose a Microsoft Outlook profile unless Collaboration Data Objects is installed and enabled for Microsoft Outlook. DesktopDeliveryPSP displays an error message if they attempt to do so.

For Microsoft Outlook 2010, Collaboration Data Objects is not required.

To install Collaboration Data Objects for Microsoft Outlook 2003, you need the Microsoft Office 2003 installation CD, and from there, follow the steps below:

1. Choose **Custom installation**
2. Choose **Detailed installation options** for each application
3. Select and enable the installation of the Collaboration Data Objects.

Microsoft Outlook 2007 users can download and install Collaboration Data Objects from Microsoft's Download Center.

For more information about Collaboration Data Objects, see your Microsoft Outlook documentation.

For Lotus Notes Users:

If you set Lotus Notes as the mail client for DesktopDeliveryPSP to watch, you have to specify your password. If you leave the **Save password** checkbox empty you will have to give it again every time DesktopDeliveryPSP starts. If you click the checkbox, your password will be stored in an encrypted format and will not be prompted for again.

Note that if Lotus Notes is installed, but is not configured properly, or not set for any users, email polling will not work, and DesktopDeliveryPSP will display an error message (during configuring the program) or the left-hand side light indicator in the program icon will turn red (during monitoring).

Folder Polling

Enable this setting to monitor a specified folder on a networked file server or local drive for incoming scanned images generated by a Ricoh device.

Watch Document Repository Folder

Click this checkbox in the **DesktopDeliveryPSP Settings** dialog to enable DesktopDeliveryPSP to monitor the folder of your choice.

Browse Button

Click the **Browse...** button to locate and select the folder you want DesktopDeliveryPSP to monitor. Browse to the network server that contains the folder to be watched; select the folder and click **OK**.

DesktopDeliveryPSP can periodically monitor this folder to see if any scanned images are placed there by the Ricoh system.

Warning: we strongly recommend that you do not choose the same folder that is used for Personalized MFP Scanning.

Transfer documents to

To specify where DesktopDeliveryPSP is to place the retrieved files, click **Browse** and choose a PaperPort folder. If the target folder has folder notes (subject, author, and keywords) then these will be applied to the files delivered by DesktopDeliveryPSP. The PaperPort folder selected in the **Transfer Documents to** section is not used by the Personalized MFP Scanning function.

Interval for checking

To set how often the watched folder or monitored inbox will be checked, select a setting from the "Interval for checking" list box. This interval is also used by the Personalized MFP Scanning functionality to process the documents you scanned remotely. The following choices are available from the list box:

- 1, 2, 5, 10, or 30 seconds
- 1, 2, 3, 5, 10, 30, or 60 minutes

In addition to the above values, you could also select **Never**. In this case DesktopDeliveryPSP will continue running but watching is suspended.

Use Defaults Button

To restore default Watch Settings for DesktopDeliveryPSP, click the **Use Defaults** button. This restores the default watch interval (30 seconds).

Note:

If you have configured default parameter values during installation, **Use Defaults** restores those values. For details, see **Customized Install**.

Get Now Button

Click the **Get Now** button if you wish to scan the folder or inbox of your choice immediately. DesktopDeliveryPSP does the monitoring on whichever component is checked.

In either case, the relevant signal of the DesktopDeliveryPSP icon on the system tray changes to "Processing" state (light green).

DesktopDeliveryPSP places the new items appearing in the watched folder or inbox on the PaperPort desktop and launches the PaperPort application - unless you have specified "Don't run PaperPort" in the **DesktopDeliveryPSP Settings** dialog.

When documents are retrieved Setting

Now that you have set the DesktopDeliveryPSP repository folder and the watch interval, specify the behavior you prefer for document retrieval. The "When documents are retrieved" setting offers three choices described in the following table:

Select this setting:	To get this result:
Run PaperPort in a window	Every time DesktopDeliveryPSP detects a new document in the folder, on the PSP Server and/or inbox being watched, it places it in PaperPort, which is then opened on your Windows desktop. It then purges the original scanned document from the folder or PSP Server being watched. If it brings a PDF or TIFF email attachment to the PaperPort desktop, the original email message remains in the email inbox but its status will switch to "Read".
Run PaperPort minimized	Same as above, but PaperPort runs minimized. (Later, when you open PaperPort, all scanned documents will be on the PaperPort desktop.)
Don't run PaperPort	Documents are transferred into the target folder, but are not placed on the PaperPort desktop until you launch PaperPort. If DesktopDeliveryPSP is watching a folder or polling email, the target folder is set under Transfer documents to. If the PSP Server is watched, the target folder is set on the device panel.

Personalized MFP Scanning

Personalized MFP Scanning is the ability to change the control panel on supported Multifunction Printers/Copiers so that it becomes customized with your own destination folders and scanning preferences. DesktopDeliveryPSP displays PPDM Desktop Module folders and scanning profiles as well as the document conversion workflows of PPDM OCR Module stored on your local computer and allows you to "push" these settings to the control panel of the Multifunction Printer/Copier through the PPDM PSP Delivery Module.

When you identify yourself to the MFP through a log-in screen it will automatically change the control panel to reflect your personal folder destinations and scanning preferences. The PPDM PSP Delivery Module requires DesktopDeliveryPSP on your local machine and the ability to control the MFP through a specially designed software interface. On select Ricoh machines this ability is referred to as the Ricoh Embedded Software Architecture (ESA) for Java™ embedded Multifunction Devices.

Use the following server for Personalized MFP Scanning

Use this option to enable the Personalized MFP Scanning functionality.

Server Button

Click the **Server** button to change the PPDM PSP Delivery Module used for the Personalized MFP Scanning functionality.

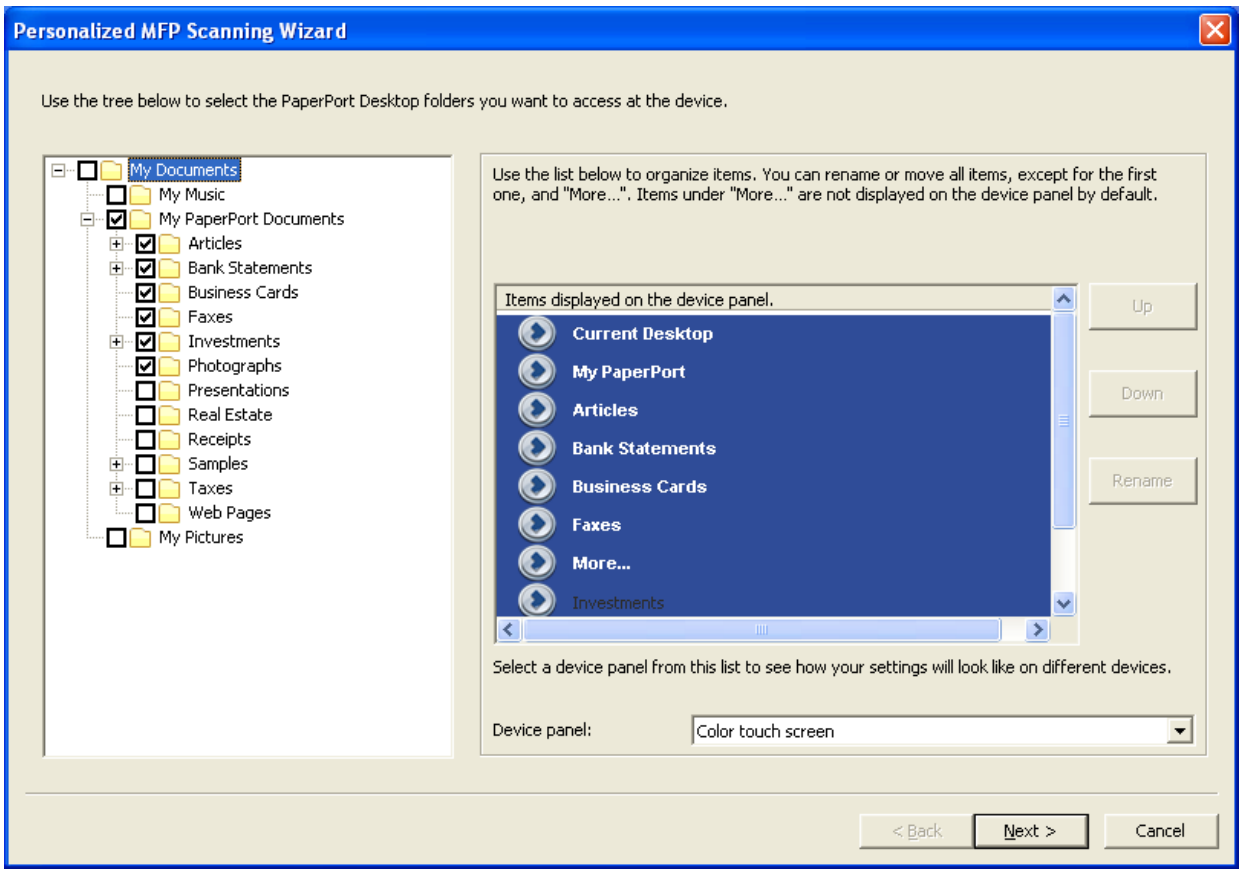
For information on available servers, contact your system administrator.

Personalized MFP Scanning Wizard Button

Click this button to display the Personalized MFP Scanning Wizard. This lets you collect and transfer information from your computer to the remote scanning device (MFP). This information includes PPDM Desktop Module Scanning Profiles, PPDM Desktop Module Folders and PPDM OCR Module Workflows.

Note:

After changing the repository settings on the server side, you have to run the Scanning Wizard again to reacquire the proper settings on the client side.



The left side of the Wizard always displays the Desktop Module folders, Desktop Module Scanning Profiles and OCR Module Workflows on your computer.

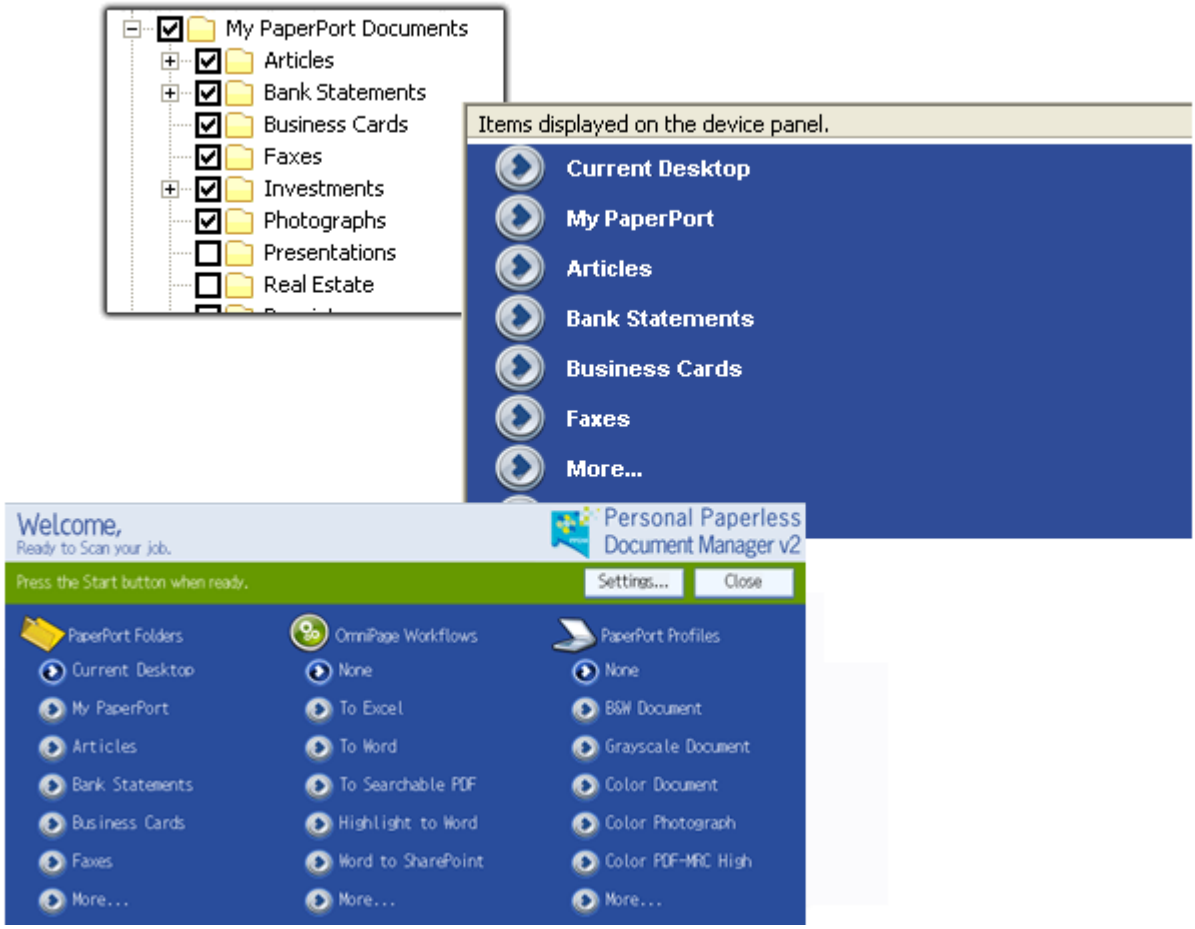
The right side of the Wizard shows the marked items that will be shown on the device panel. These items change dynamically reflecting modifications on the left: marking or unmarking folders, profiles or workflows. Newly marked items are added to the bottom of the table. To change item order, use the buttons **Up** and **Down**.

The device panel has limited space, so long folder, profile and workflow names may get truncated when added to the table. To change (truncated) names, use the **Rename** button. Predefined items ("Current Desktop" or "none") cannot be moved or renamed.

You can use the **Device panel** dropdown list at the bottom to match the on-screen display of the table with that of the device panel type. This way you can have a preview of how your items will look like on different devices.

When you select table items, the corresponding folder, profile or workflow gets selected on the left. When you change the selected folder, profile or workflow on the left, the corresponding item gets selected in the table (provided that it is marked).

If you mark too many items (folders, scanning profiles or workflows) on the left to fit into the limited space of the device panel, a special item appears in the table: **More…**. This will also be added to the list on the device panel. Push **More…** on the device panel to access items that are listed in light grey under **More..** on your screen.



The last list item in the table is always **Other folders / workflows / profiles (set by Administrator)**. These are to remind you that you may find additional destinations, workflows and / or profiles on the device panel - provided that your system administrator has set them up for you.

OCR Module Workflows

OCR Module Workflows allow you to apply multiple document conversion options into a single setting that can be pushed to the device panel as a button. Document conversion options include file format settings, conversion methods and additional document destination preferences. Scanner setting choices available in OCR Module workflows are not used by Personal Paperless Document Manager v2. To create selectable scanner preferences you will need to create or modify Desktop Module Scanning Profiles. For information on creating and modifying workflows, consult your PPDM OCR Module documentation.

Scanning profiles

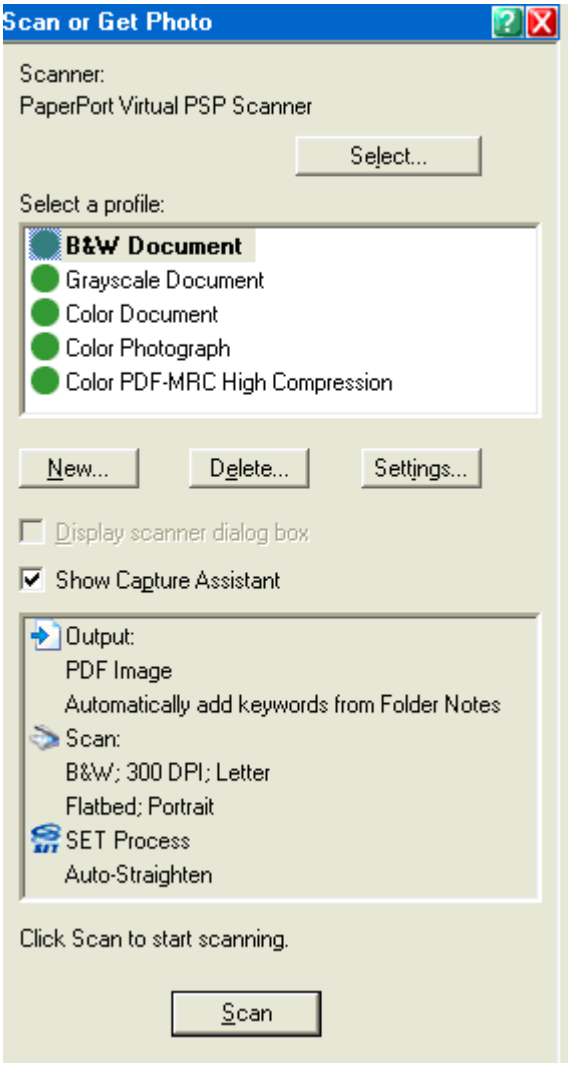
Desktop Module Scanner Profiles allow you to combine multiple scanning settings and image enhancements into a single setting that can be pushed to the device panel as a button. The Scanner Profiles will override the default scanning settings of the device including resolution,

paper size, color depth and other settings where applicable to your particular device. Image corrections, known as Scanner Enhancement Technology (SET) in PPDM Desktop Module, are applied by the Desktop Module when the image is transferred from the device to the Desktop Module desktop.

To add a new scanning profile to the device interface or to update one that you have previously changed in PaperPort, click the **Personalized MFP Scanning Wizard** button in the **DesktopDeliveryPSP Settings** dialog box when you have finished the modifications.

Use the Desktop Module to create new profiles or modify existing ones. Click on the **Scan or Get Photo** button in the Desktop Module main toolbar to display the **Scan or Get Photo** pane.

This lists your scanning profiles.



For more information on scanning profiles, consult your PPDM Desktop Module documentation.

PaperPort PSP Virtual Scanner

Desktop Module is designed to handle (create, modify or delete) scanning profiles for local scanners. If you do not have a scanner connected to your machine, use the Desktop Module PSP Virtual Scanner tool to work with scanning profiles. It is automatically installed along with DesktopDeliveryPSP.

The Virtual Scanner is a tool for scanning profile management. It is not intended for scanning - a STOP sign (along with explanation text) reminds you of this, when you try the operation.

OK Button

Click **OK** in the **DesktopDeliveryPSP Settings** dialog box to confirm DesktopDeliveryPSP settings.

Context menu commands

The following commands are available through the context menu.

Get Now

Use this command for the same purpose as the corresponding button in the DesktopDeliveryPSP Settings dialog. For details, see the **Get Now** button.

Use Defaults

Use this command for the same purpose as the corresponding button in the DesktopDeliveryPSP Settings dialog. For details, see the **Use Defaults** button.

Refresh Defaults

If your system administrator has set up default destinations, workflows or profiles for you, they will not appear on the device panel until you restart DesktopDeliveryPSP or use this command to refresh these defaults.

View Log

To get information about program events, right-click the DesktopDeliveryPSP icon, then choose the **View Log** command. Click **OK** to close this panel or the **Clear Log** button to delete your current list of events.

About

To get version and copyright information about DesktopDeliveryPSP, right-click the DesktopDeliveryPSP icon to display its menu. Click the **About** command. You can also select **About...** from the DesktopDeliveryPSP Settings dialog. Click **OK** to close the About window.

Close

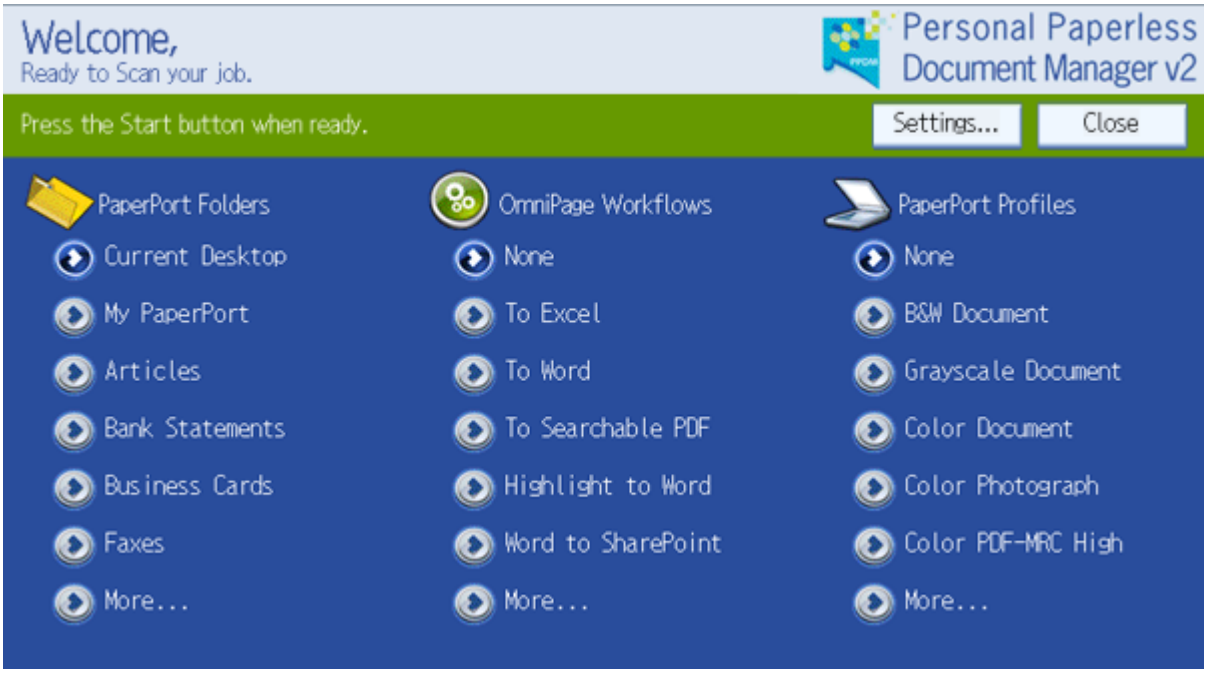
To close DesktopDeliveryPSP, right-click the DesktopDeliveryPSP icon to display its menu. Click the **Close** command. After selecting this, the program displays the following message: `Closing DesktopDeliveryPSP disables the automatic placement of Network Scanner documents into your PaperPort. Do you wish to close the DesktopDeliveryPSP now?` Select **Yes** to close, or **No** to cancel.

Using DesktopDeliveryPSP via a remote device

First, consult your device manual or system administrator on how to access custom applications on the device. Typically, it is done as follows:

1. Press the Other Function ( ) hardware button on the device.
2. If Personal Paperless Document Manager v2 does not start immediately, press the **ScanToPPDM** button on the device panel to launch it. In case there is no **ScanToPPDM** button displayed, Personal Paperless Document Manager v2 has not been set up yet, so you need to:
    1. Press the User Tools/Counter/Inquiry ( ) hardware button to display the User Tools/Counter/Inquiry screen.
    2. Press the **Extended Feature Settings** button at the bottom left of the device screen to display the Extended Feature Settings Menu screen.
    3. Press the **Extended Feature Settings** button on the device screen to display the Extended Feature Settings screen.
    4. Locate the extended feature and launch it.
    5. Press the **Exit** button on the device screen to close the Extended Feature Settings screen.
    6. Press the **Exit** button on the device screen again to close the User Tools/Counters/Enquiry screen.
    7. Press the **Other Function** hardware button on the device again.
3. If authentication is turned off (that is, you did not have to type in your user name and password beforehand), at this point you will need to select your name from the list of registered users and press the Login button.

4. The Personal Paperless Document Manager v2 application main screen displays showing your Desktop Module folders, OCR Module Workflows and Desktop Module Scanning Profiles.
5. If your system administrator has set up default destinations, workflows and profiles for you, these items will also appear on the device panel, under your personal items.



To specify your settings, see the section **Personalized MFP Scanning Wizard Button** in this guide.

Clicking the **Settings...** button gives you access to your scanning settings.

When no Desktop Module profile is selected, the following default values will be used:

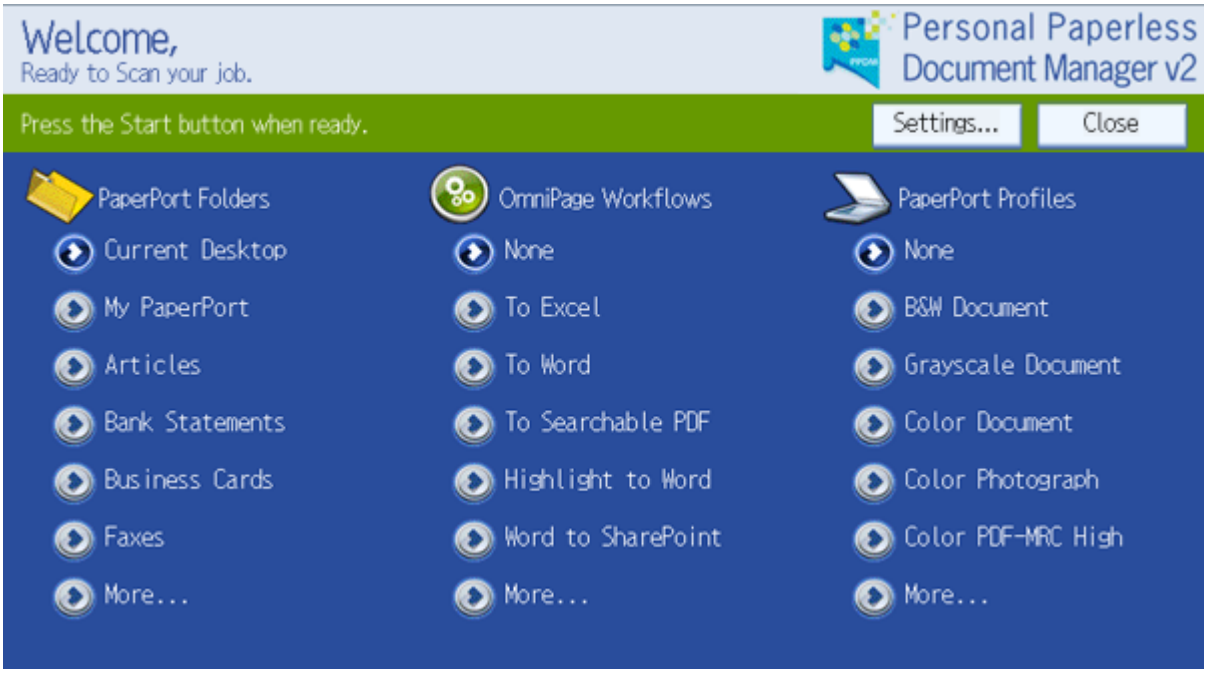
- Color: black-and-white
- Resolution: 300dpi
- Original type: Photo and Text
- Scanning method: 1-sided (simplex)
- File format: TIFF.

Settings (including the above listed default ones) always remain in use until you change them and scan.

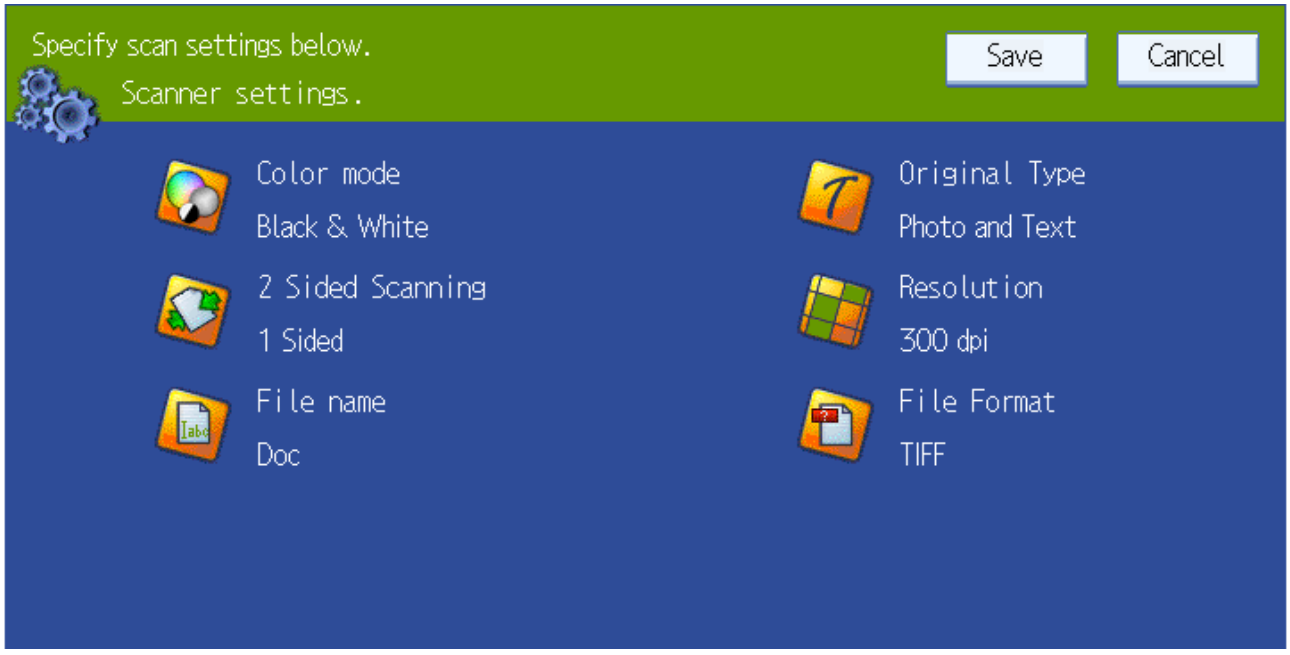
That is, if - after scanning once - you re-enter the service, modify some settings, then exit the service (but do not do any scanning), your setting modifications will be ignored.

Modifying settings

You can change your scanning settings from the main screen of the device panel that lists your PPDM Desktop Module Folders, PPDM OCR Module Workflows and PPDM Desktop Module Scanning Profiles.



Push the **Settings...** button to access the following screen:



Depending on the capabilities of the device you are using, some options may not be available. For instance, if your device can only scan black-and-white, the **Color mode** option is not available.

Also, if you are using a specific PPDM Desktop Module Profile, you will not be able to change some of its presets (e.g. file format and file name) here. You can only do this by modifying the profile itself: launch PPDM Desktop Module on your machine, update the profile and then publish it to the device again through the Wizard.

You can adjust scan settings in the following categories:

- Color Mode
- Resolution
- Original Type
- Scanning Method
- File Format and
- File Name.

Scanning profiles may contain settings that are not supported by the device in use. In such cases, the following warning message is displayed on the main screen of the device panel: "Ready to Scan your job (with device-specific re-adjustments)". This can imply two scenarios:

You attempted scanning grayscale or color on a black-and-white device. > Color Mode will switch to black-and-white and all other scan settings remain unchanged.

You tried scanning at an unsupported resolution. > The closest matching value will be used.

Other Information about DesktopDeliveryPSP

Now that you have specified the DesktopDeliveryPSP watch folder, watch interval, monitored inbox and PPDM Desktop Module behavior and Personalized Scanning Server, here is some other information about DesktopDeliveryPSP.

- **User-specific watch folder**. Only one user and one application is able to watch a specific folder at any time.
- **Supported client operating systems**. Microsoft Windows XP SP3, Vista (32 and 64-bit versions), Windows 7 (32-bit and 64-bit versions).
- **Supported email clients**. Microsoft Outlook 2003, 2007, and 2010; Lotus Notes 7.x and 8.x.
- **Supported image file formats**. DesktopDeliveryPSP supports the following file formats:
    - JPEG
    - PDF
    - TIFF

Customized Install

You can define DesktopDeliveryPSP program defaults during installation.

To install DesktopDeliveryPSP with customized defaults, install only OCR Module, Desktop Module and PDF Converter Module with the Personal Paperless Document Manager v2 installer. Uncheck the installation of the DesktopDeliveryPSP component, then browse to the `PPDM DesktopDeliveryPSP 10`folder on the CD, and launch `setup.exe` from the command line with the desired parameters.

Configuration options and the corresponding parameters are as follows:

User interface language: specify the DesktopDeliveryPSP user interface language with the `/L` parameter.

Value	Behavior
1033	English
1031	German
1034	Spanish
1036	French
1040	Italian
1046	Brazilian Portuguese

Note:
You can only select languages supported by your installation.

Default watched folder: specify the default watched folder

Parameter: `WATCHFOLDER=<path_to_the_folder_name>`

You can specify any path here, provided that you have write access to the chosen folder. DesktopDeliveryPSP path syntax supports mapped drives and UNC standards as well.

Folder watching: enable or disable folder watching

Parameter: `FOLDERWATCH=[0...1]` .

Value	Behavior
0	disable folder watching (factory default)
1	enable folder watching

The value 1 is accepted only if you also specify a valid watched folder via the `WATCHFOLDER` parameter.

Default email profile: specify the default Microsoft Outlook email profile

Parameter: `EMAILPROFILE=<email_profile>`

You can specify the email profile to be used for email polling.

Note:
Email polling cannot be configured during install time for Lotus Notes.

Email polling: enable or disable email polling

Parameter: `EMAILWATCH=[0...1]`.

Value	Behavior
0	disable email polling (factory default)
1	enable email polling

The value 1 is accepted only if you also specify a valid email profile to watch via the `EMAILPROFILE` parameter.

Personalized MFP Scanning Server: specify the default Personalized MFP Scanning Server.

Parameter: `PSPSRVDEF=<server name or IP Address>`

Specify the PSP Server here, provided that it is installed. `<server name or IP Address>` must not include the leading `\\`.

Personalized MFP Scanning:enable or disable the collaboration with the PSP Server.

Parameter: `PSPSRVWATCH=[0...1]`.

Allow configuring MFP Scanning:enable or disable modification of the PSP server settings.

Parameter: `PSPALLOWCONFIG=[0...1]`. The default is 1 (enabled).

This parameter should be used only in conjunction with the `PSPSRVDEF` and `PSPSRVWATCH` parameters.

Watch interval: define the default watch interval

Parameter: `POLINT=[1...13]`

Value	Watch interval
1	1 sec
2	2 secs
3	5 secs
4	10 secs
5	30 secs (factory default)
6	1 min
7	2 mins
8	3 mins
9	5 mins
10	10 mins
11	30 mins
12	60 mins
13	"Never"

PaperPort behavior: set default PaperPort behavior: “Run PaperPort in a Window”; “Run PaperPort Minimized” or “Don’t run PaperPort”.

Parameter: `PPACTION=[0...2]`

Value	PaperPort behavior
0	“Run PaperPort in a Window” (factory default)
1	“Run PaperPort Minimzed”
2	“Don’t run PaperPort”

Example 1: Installing DesktopDeliveryPSP to watch the folder ’Documents’ on the P drive with German user interface:

```
setup.exe /L1031 /v”WATCHFOLDER=P:\Documents FOLDERWATCH=1"
```

Example 2: Installing DesktopDeliveryPSP to watch the folder ’repository’ on the server ’global’, with English user interface. Watch interval is 3 minutes, and PaperPort is launched minimized:

```
setup.exe /L1033 /v”FOLDERWATCH=1 PPACTION=2 WATCHFOLDER=\”\\global\repository\” POLINT=8"
```

Example 3: Installing DesktopDeliveryPSP to poll the Microsoft Outlook inbox with the email profile ’MyProfile’ set:

```
setup.exe /v”EMAILPROFILE=MyProfile EMAILWATCH=1"
```

Example 4: Installing DesktopDeliveryPSP Professional to use 'PSPTestServer' as the Personalized MFP Scanning server

```
setup.exe /L1033 /v"PSPSRVDEF=PSPTestServer PSPSRVWATCH=1"
```

Note:

All parameters not specified in the examples above will take their factory default values.

PPDM Desktop Module 12

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Release Notes for PPDM Desktop Module 12

Version 12.1
English version
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www.nuance.com
Last modified: November 9, 2010

For Personal Paperless Document Manager v2, the product names **PaperPort, PaperPort Professional** and **Desktop Module** are used interchangeably.

Please read this document for late-breaking or detailed information about Nuance PaperPort 12 that could not be included in its other documentation. It relates to both PaperPort 12 Professional PaperPort 12 versions of the product. In the rest of this document, the name PaperPort 12 is used for both versions unless Professional is used in the name. Up-to-date information and a knowledge base are available on the PaperPort support web page (http://www.nuance.com/imaging/support/default.asp). You can access this directly from inside PaperPort 12, using the Product Information button in the Help ribbon.

These release notes discuss the following main topics:
Minimum System Requirements
Installation and Uninstallation
Scanner Support
Known issues
Third-party licenses

Minimum System Requirements

To install and run PaperPort 12, your Windows-compatible PC must meet or exceed the following requirements:

- A computer with an Intel® Pentium®, newer or equivalent processor.
- Microsoft Windows XP (32-bit) SP3 or above, Windows Vista SP2 or above, Windows 7
- Microsoft Internet Explorer 6.0 or above
- 512 MB of memory (RAM), 1GB recommended
- 500 MB of free hard disk space for application files plus 20 MB working space during installation
- SVGA monitor with 256 colors, but preferably 16-bit color (called Medium Color in XP and Vista) and at least 800 x 600 pixel resolutions
- Windows-compatible pointing device
- CD-ROM drive for installation
- A compatible scanner with its own scanner driver software, if you plan to scan documents. See the Scanner Guide at Nuance's web site www.nuance.com for a list of supported scanners.
- Web connection (with IE 6.0 or above). Web access is needed for product registration, activation, Scanner Wizard database updating and obtaining live updates for the program

If your computer does not meet all of these requirements, the installation will continue, though some features might not work on your system. Please ensure that you have the most recent Windows Service Pack available.

Installation and Uninstallation

Before you install or uninstall PaperPort 12, exit from any open applications so that only Windows is running. There should be no applications listed in the task bar other than Windows Explorer.

Upgrading from PaperPort 12 to PaperPort 12 Professional
Before installing PaperPort 12 Professional, please uninstall the following components from your computer:
• PaperPort 12
• PDF Viewer Plus
• PaperPort Image Printer

Installing PaperPort 12
The installation program provides easy step-by-step instructions. Follow the guidance on each screen to install the software. Installation and un-installation require Administrator rights.
PaperPort installation comprises three elements that are installed in a single process:
• PaperPort program (also includes ImageViewer, ScanDirect and Scanner Setup Wizard)
• PDF Viewer Plus (in PaperPort Professional this includes PDF Create)
• PaperPort Image Printer
PDF Viewer Plus is not installed if the top-line Nuance product PDF Converter Professional is detected on the computer (version 5 or above) because it provides all the functionality of PDF Viewer Plus, and much more additionally.
To install PaperPort, launch the Autorun executable, select an installation language if offered, accept or change the program location. The program location must be a local folder on your computer. If PDF Viewer Plus is to be installed, you have two checkmarks:

Set Nuance PDF as your default viewer for Windows and Internet Explorer
This sets PDF Viewer Plus as your system default PDF viewer. PDF files on the PaperPort desktop are by default opened in a Nuance PDF product. If you select this option, PDF files that are double-clicked anywhere on your system will open in PDF Viewer Plus.

Install all Nuance PDF button and menu application add-ins
This places a Nuance PDF ribbon or toolbar in Microsoft Word, Excel, PowerPoint, Outlook and Internet and Windows Explorer and Corel WordPerfect, allowing PDF Create to make PDF files from the current document or mail attachment or web page. Go to Control Panel Add/Remove programs to later enable or disable these add-ins individually.

Autorun then starts the installers of the software components. PaperPort installer offers a Compete or a Custom installation. Choose Custom only if you want to add your own folders to the supplied PaperPort Desktop folders during installation.

Activating PaperPort
Most versions of PaperPort 12 and the associated PDF Viewer Plus require activation. For activation and deactivation you need web access. You will be invited to activate the product at the end of installation. Choose from automatic or manual activation. The recommended choice is automatic; then PaperPort and the PDF Viewer (with PDF Create for the Professional product) are activated together. Provided your serial number is found at its storage location and has been correctly entered, no user interaction is required and no personal information is transmitted.
Manual activation requires interaction and the two programs must be activated separately.
If you do not activate the product at installation time, you will be invited to do this each time you invoke the program. PaperPort 12 and the PDF Viewer can be launched only five times without activation.

Activating PaperPort 12 on a computer without an established Internet connection
If you install PaperPort 12 on a computer on without an Internet connection, when you launch PaperPort, the activation wizard will appear. PaperPort can be activated if there is separate machine that is connected to the internet. Select the option to activate manually. The serial

number and the machine fingerprint will appear. Go to the website http://activation.scansoft.com/us/ on the machine with an internet connection; enter your product serial number and computer fingerprint to generate an activation key. Write down the activation key that is generated, return to the machine without the internet connection and enter the activation key into the manual activation dialog.

Invalid serial number message when activating PaperPort:
If an “Invalid serial number” message appears during activation, the serial number may have been keyed improperly or it could be an invalid serial number. Refer to the serial number on the back of the CD-ROM sleeve to ensure that all characters were entered in the proper order. If PaperPort was ordered as a download, the serial number should appear in the confirmation email.
For additional help, go to the following website: http://activation.scansoft.com/us/help/

Registering PaperPort 12
At the end of installation, you will be asked to fill out an electronic form to register your copy of PaperPort 12. If you decide not to, you will be prompted again seven days later.

Registering PaperPort 12 on a computer without an Internet connection
If you install PaperPort 12 on a computer without an Internet connection, you should choose the option 'Print registration form'. This opens the form as an HTML page with some items already filled. Please fill in the remaining items then print it. You can print it to a physical printer and send the form to Nuance by fax or by regular email.

Uninstalling PaperPort
For a full uninstallation, the three PaperPort components should be removed, one after the other, in any order. The components are
• PaperPort 12
• PDF Viewer Plus
• PaperPort Image Printer
Removing only the Image Printer and/or the PDF Viewer will cause PaperPort to function incorrectly.
To uninstall PaperPort from your computer:
1. Select Add/Remove Programs from the Control Panel.
2. Select Nuance PaperPort 12.
3. Click Remove to uninstall the program.
4. Repeat this for the remaining 2 components.
5. A computer re-start might be needed to complete the removal.
A de-activation step is performed at the start of un-installation, allowing you to reinstall the program later without re-activation problems. De-activation and re-activation require web access.

Failed uninstallation
Should the uninstallation of PaperPort 12 or PDF Viewer Plus fail for any reason, you can clean up your system from all references to these products by using our Remover.exe application. This application can be found on the PaperPort product CD-ROM in the folder PaperPort\Utility (for PaperPort 12) or in the PDFViewer\Utility folder (for PDF Viewer Plus).
After running this utility, reboot the machine and the component will be uninstalled.
Note: On a machine with restricted user rights, log into the machine with administrator rights before running this utility.

Launch PaperPort
You should launch the main PaperPort application at least once after installation, before attempting to use other PaperPort application (such as Image Viewer, or ScanDirect).

Scanner Support

Install your scanner before you install PaperPort 12
Your scanner must be working independently of the program prior to connecting it to PaperPort 12. Scanners to be used by PaperPort 12 should be installed according to the scanner manufacturer's specifications. Please consult the documentation that came with your scanner for information.

TWAIN and WIA drivers
PaperPort 12 supports scanners that are controlled by **TWAIN** or **WIA** (Windows Image Acquisition) scanner drivers. PaperPort 12 supports any fully TWAIN- or WIA-compliant scanner or other input device that can supply at least a binary (black-and-white) image in a supported resolution (200 to 600 dots per inch).
The recommended maximum scan resolution is 400 dpi.
If any scanning problem occurs with PaperPort, first please test whether you are able to scan into another scanner-enabled imaging application. Use the Windows Paint application to test WIA, and any imaging application from some other vendor to test TWAIN.

ISIS drivers
In addition to scanning via TWAIN or WIA, PaperPort 12.1 also supports **ISIS**-scanning.
If any scanning problem occurs with PaperPort, first please test whether you are able to scan into another ISIS supported application.

Scanner Setup Wizard
PaperPort 12 includes a Scanner Setup Wizard that will automatically test and optimize your scanner for use with PaperPort 12. You can find its shortcut next to that of PaperPort 12 in the Windows Start menu. You can also launch it at any time by choosing the Select button on the „Scan or Get Photo" pane (Scan Settings on the Desktop ribbon). The Scanner Setup Wizard is launched automatically after installation when you first attempt to scan. This ensures that your scanner is optimized before you start scanning documents.

Using more than one scanner in PaperPort
If you have more than one scanner installed on your computer, you may use the Scanner Setup Wizard to use those scanners with PaperPort. Select button on the „Scan or Get Photo" pane (Scan Settings on the Desktop ribbon).

Scanner compatibility
Since scanners change frequently, please refer to http://support.nuance.com/compatibility for the most recent information about PaperPort and scanner compatibility. If you are having problems with your scanner, please contact the scanner manufacturer for assistance. Often, scanner manufacturers provide web sites that provide the latest scanner drivers, answers to frequently asked questions, and other information about their products.

Known issues

Using the new user interface
For guidance on using the new tab and ribbon user-interface, please see the help topic "Elements of the user interface".

Known issues with PDF image editing in PDF Viewer Plus
Editing an image in PDF files in Image Viewer has some limitations; this has been primarily designed for simple image-only PDF files. More complex PDF files may yield unexpected results. If you do not know the origin of your PDF file and you get unexpected results when editing images embedded in a PDF it is a complex PDF with image effects already applied.

- In PDF Viewer, selecting an area of an image and choosing Edit Image is not working. Instead, you should select the **whole image** and double-click it to initiate the image editing of the embedded image in question.
- PDF files with overlapping objects are not supported for image editing.
- When clipping path is applied to an image (in order to hide portions of the image while displaying), after editing the clipping path is lost and the entire image will be displayed.
- For PDF files with certain image transformation matrixes, the image editing operation might result in improperly updated or rotated image in the PDF file.

Use of Annotations on PDF files
If you intend to use annotations on PDF files of any kind we suggest doing so in the new PDF Viewer Plus. The annotations in the ImageView and ImageViewer are primarily to add text or notes to image files. Annotations on images (jpg, bmp, etc.) will become permanently applied to the image.

Image editing in PDF Converter Professional 6
When using PDF Converter Professional 6, image editing is started in a slightly different way than in PDF Viewer. Instead of the “Select Image” tool, you should use the "Touch-up Object" tool to select the object. Then the shortcut menu offers “Edit image”.

Third-party licenses

For third-party licenses, please see the legal section of the PaperPort Help.

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Welcome!

Nuance® PaperPort® is a desktop document management software package that helps you scan, organize, access, share, and manage both your paper and digital documents on your personal computer. The PaperPort desktop provides large, clear thumbnails that allow you to visually organize, retrieve, assemble and use all your documents including scanned paper, photographs, word processing files, spreadsheets, and PDF files.

What's New in PaperPort 12?

PaperPort 12 includes a number of valuable new features to help you manage your documents.

- **Improved PDF performance:** PDF files can now be opened more speedily and displayed in PDF Viewer Plus, a newly developed Nuance PDF handling application that is fully compatible with Adobe Acrobat. PDF Viewer Plus opens files much faster than the general-purpose ImageViewer (also available in PaperPort 12), reducing memory requirements and permitting smaller file sizes. The new viewer optimizes the rendering resolution for each element on the page yielding a cleaner display and optimum print resolution.

- **Enhanced PDF features:** PDF Viewer Plus provides a wide range of new PDF features including improved annotations, and dynamic or transparent stamps. Images within a PDF document processed by PDF Viewer Plus can be sent to the ImageViewer where they can be enhanced using SET tools, with the modified image returned to the PDF.

  You can fill and e-mail PDF forms and create new ones, either from scratch or by using an updated FormTyper to instantly make any static form fillable. It is now integrated into the PDF Viewer Plus and uses Logical Form Recognition® technology to detect the form elements and also allows their properties to be managed better than ever before.

  Searchable PDF files are available through Scanner Profiles, through a right click “Save As” operation on the PaperPort Desktop, or directly in the PDF Viewer Plus application. This makes the content of your scanned paper documents or image files accessible to search engines such as Windows Desktop Search or Google.

- **Tab-and-ribbon User Interface:** PaperPort 12 is now easier to use because all the program features are presented on a set of tabbed ribbon style toolbars with controls placed in functional groups. We've also added the new "Scan Now" button so you can scan with one click without having to change to the scanner settings view. A customizable Quick Access Toolbar appears above the ribbon toolbars so you can put your most frequently used features in one easy-to-find place.

- **More accurate OCR:** OCR (Optical Character Recognition) scanning accuracy has been significantly increased over previous versions; this improvement is reflected in greater success when searching the content of Searchable PDF file archives. Language settings can now be applied to Optical Character Recognition to provide even greater accuracy in all supported languages.

- **Folder Colors:** The number of colors available for distinguishing folders rises from 9 to 29.

- **Digital camera input:** The Send To Bar options for text applications have been updated to include a PaperPort OCR option for digital camera correction. It is now possible to take a picture of a document and accurately convert it into a text document with this feature. This is done by applying special 3D-deskewing algorithms that flatten page images and correct distortions thereby increasing the accuracy of the resulting text document.

- **Making PaperPort more reliable:** Sometimes PDF files may become corrupted so that they can no longer be opened. In these cases PaperPort may not be able to generate a desktop thumbnail and this may prevent PaperPort from launching properly. A new utility program CheckPPFolders.exe is supplied in the PaperPort program folder. Run this program to identify and remove any corrupt files so that PaperPort will work properly.

- **How-to-Guides:** The program offers an updated series of illustrated 'mini-guides' showing typical tasks and processes, providing quick access to program areas and relevant Help topics. The How-to-Guides can be switched on in the Help section of the tabbed ribbon.

The following new and key features are available only in PaperPort Professional 12:

- **Folder Management:** You can now automatically create multiple folders by importing a list of folder names from a text file. This option is available when you right-click on any folder.

- **New features in PDF Viewer Plus and PDF Create Assistant:** You can create industry-standard text based PDF documents from any application directly with a "right-click" through the Windows or PaperPort Desktops (up to PDF version 1.7), using the PDF Create Assistant or by printing directly from any application with the PDF Create printer driver. Additionally you can create PDF packages, batch create PDF files and much more using the PDF Create Assistant.
  A table in the PDF Viewer Help (in the section on PDF creation) summarizes which options and targets are available.

- **Support for SharePoint:** PaperPort Professional 12 is able to communicate with the Microsoft SharePoint Services 2003, SharePoint Portal 2003, SharePoint Services 2007 and SharePoint Server 2007 document management systems: get files from there, process them as desired, and then save the results by sending the output files back through the Send To Bar. ScanDirect supports scanning to PDF with the results directed to SharePoint.

- **Unlimited Scan Profiles:** You can freely create and configure new Scan Profiles, or remove unwanted ones.
- **PDF-MRC High Compression:** Create scanned color PDF files that are up to 8 times smaller than regular scanned documents.
- **Professional Capture Assistant:** The Capture Assistant displays thumbnails of pages as they are scanned. After scanning, you can re-order or rotate pages or add blank separator pages. When you are done, you can specify subject, author and keywords for your items.

Closer integration with other Nuance products:

- If you have Nuance® OmniPage® on your system, PaperPort cooperates with it more closely than ever, providing cutting-edge OCR page recognition services and high-level PDF creation.

- PaperPort Professional 12 comes with integrated PDF Create enabling you to create smaller text-based PDF files from applications and assemble PDF files quickly and easily from a variety of source documents.

PaperPort is also supplied in Special Editions to selected scanner manufacturers and other resellers. The feature set in these editions may vary, in line with each vendor's requirements.

Learning to use PaperPort

To help you learn how to use PaperPort, you'll find a wealth of information in our:

- PaperPort How-to-Guides
- PaperPort Help
- Getting Started Guide
- PaperPort Release Notes
- Nuance Knowledge Base

Know all the tips and tricks!

The *PaperPort Help* includes comprehensive information on features, concepts, tunable options, and step-by-step procedures.

Help is available at all times. Just click PaperPort Help on the Help ribbon. PDF Viewer Plus has its own help system which describes how to view, annotate and work with PDF files. It includes help on the PDF creation available in PaperPort Professional using Nuance PDF Create, either by direct conversion or via the PDF Create Assistant.

Get started instantly

The PaperPort *How-to-Guides* offer you a quick start in key program areas, including scanning, assembling documents, enhancing images and more. Access them from the Help ribbon.

Read all about what you can do

Read the *Getting Started Guide* to find out what you can do with PaperPort. This guide provides an overview of all PaperPort features. Use the Help ribbon to view the guide as a PDF file.

Understand all the important details

The *PaperPort Release Notes* provide important information about this software release of PaperPort. Use it to reference system requirements, installation steps, and resolutions to known issues. You can find it in the Samples folder that is provided with PaperPort or you can access it on the PaperPort Help ribbon at any time.

Discover a wealth of information on the Nuance web site

The *Nuance web site* provides a wealth of information about your PaperPort software, including Frequently Asked Questions, Technical Notes, software updates, and more! Refer to the PaperPort Knowledge Base for information related to a particular concern or to find answers to a specific question.

To launch your web browser and go directly to the Nuance web site, select Nuance on the Web on the Help ribbon.

Thank you for using PaperPort software!

www.nuance.com

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Powered by

NUANCE

Personal Paperless Document Manager v2

Quick Reference Guide

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PaperPort 12 Getting Started Guide, January, 2010

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Welcome to PaperPort

Welcome to the Nuance® PaperPort® *Getting Started Guide*. It is supplied as a PDF file, suitable for use with screen readers. If you print it to paper, we recommend double-sided printing with two pages per sheet.

PaperPort provides the easiest way to turn paper into organized digital documents that everybody in an office can quickly find and use. PaperPort works with scanners, multifunction printers, and networked digital copiers to turn paper documents into digital documents. It then helps you to manage them along with all other electronic documents in one convenient and easy-to-use filing system.

PaperPort's large, clear item thumbnails allow you to visually organize, retrieve and use your scanned documents, including Word files, spreadsheets, PDF files and even digital photos. PaperPort's Scanner Enhancement Technology tools ensure that scanned documents will look great while the annotation tools let you add notes and highlights to any scanned image.

Accompanying programs

PaperPort 12 includes a PaperPort image printer, a ScanDirect application (described later), a Scanner Setup Wizard, an ImageViewer application (for viewing and working with page images in a window separate from PaperPort) and PDF Viewer Plus (for viewing and working with PDF files). In PaperPort Professional 12, the PDF Viewer Plus includes Nuance PDF Create, providing high-level support for PDF creation from a wide variety of source files.

Installing PaperPort

You can install PaperPort from a CD or from the Web. The installation program provides easy step-by-step instructions. Follow the guidance on each screen to install the software. Installation and un-installation require Administrator rights.

PaperPort installation comprises three elements that are installed in a single process:

- PaperPort program (includes ImageViewer, Scan Direct and Wizard)
- PDF Viewer Plus (in PaperPort Professional this includes PDF Create.)
- PaperPort image printer.

PDF Viewer Plus is not installed if the top-line Nuance product PDF Converter Professional is detected on the computer (version 5.3 or above) because it provides all the functionality of PDF Viewer Plus, and much more additionally.

Click Autorun, select an installation language, accept or change the program location. If PDF Viewer Plus/Create is to be installed, you have two checkmarks:

Set Nuance PDF as your default viewer for Windows and Internet Explorer

This sets PDF Viewer Plus as your system default PDF viewer. PDF files on the PaperPort desktop are by default opened in a Nuance PDF product. If you select this option, PDF files that are double-clicked anywhere on your system will open in PDF Viewer Plus.

Install all Nuance PDF button and menu application add-ins

This places a Nuance PDF ribbon or toolbar in Microsoft Word, Excel, PowerPoint, Outlook and Internet and Windows Explorer and Corel WordPerfect, allowing PDF Create to make PDF files from the current document or mail attachment or web page. Go to Control Panel Add/Remove programs to later enable or disable these add-ins individually.

Autorun then starts the installer. It offers a Complete or a Custom installation. Choose Custom only if you want to add your own folders to the supplied PaperPort folders during installation. You can add folders later (see page 24).

Activating PaperPort

Most versions of PaperPort 12 and the associated PDF Viewer Plus require activation. For activation and deactivation you need web access. You will be invited to activate the product at the end of installation. Choose from automatic or manual activation. The recommended choice is automatic; then PaperPort and the PDF Viewer (with PDF Create for the Professional product) are activated together. Provided your serial number is found at its storage location and has been correctly

entered, no user interaction is required and no personal information is transmitted. Manual activation requires interaction and the two programs must be activated separately.

If you do not activate the product at installation time, you will be invited to do this each time you invoke the program. PaperPort 12.0 and the PDF Viewer can be launched only five times without activation.

Registration

Registration enables you to take full advantage of Nuance® product support and to receive notifications of product updates.

When you finish installing PaperPort, you are prompted to register online. If you want to update your registration information, you can always go to the Nuance web site at **http://www.nuance.com**.

Learning PaperPort

This guide introduces you to PaperPort and shows you how PaperPort can help you manage your information. Additional sources of information to help you learn how to use PaperPort include a comprehensive Help system, the How-to-Guides, Release Notes, and the Nuance web site. Access these from the Help ribbon.

Using this Guide

This guide is written with the assumption that you know how to work in the Microsoft® Windows® environment. Please refer to your Windows documentation if you have questions about how to use dialog boxes, menu commands, scroll bars, drag and drop functionality, shortcut menus, and so on.

Using Help

The PaperPort Help includes detailed information on features, settings, and procedures. Help is available from the PaperPort Help ribbon.

Additional technical support, including technical notes, software updates, product information and product support issues and more is available also from the PaperPort Help ribbon.

PDF Viewer Plus, and also PDF Converter Professional, have their own Help systems that include guidance on PDF creation.

Using release notes

PaperPort Release Notes provide important information about this release of the program. This document is included on the installation CD, from the PaperPort Help ribbon, and as a sample document on the PaperPort desktop.

Technical Support

Nuance offers both complimentary and fee-based technical support options designed to meet your individual needs. Our services offer person-to-person telephone and e-mail technical support. We also offer self-service, 24-hour access to our Knowledge Base.

Visit **http://www.nuance.com** for information about your support policy, local support contacts, and product updates. Before contacting Nuance, be sure to read the user documentation and review the Release Notes.

Minimum System Requirements

A computer with an Intel® Pentium® or higher processor

Microsoft Windows XP 32-bit with SP3 or above, Windows Vista 32-bit and 64-bit with SP2 or above, Windows 7 (32- and 64-bit versions)

Microsoft Internet Explorer 6.0 or above

512 MB of memory (RAM), 1 GB recommended

500 MB of free hard disk space for application files plus 20 MB working space during installation

SVGA monitor with 256 colors, but preferably 16-bit color (called Medium Color in XP and Vista) and at least 800 x 600 pixel resolution

Windows-compatible pointing device

CD-ROM drive for installation, or suitable web access for download

Web connection (with IE 6 or above) for activation and web updates

Performance and speed will be enhanced if your computer's processor, memory, and available disk space exceed minimum requirements. This is especially true when handling very large color image and PDF files.

What's new in PaperPort 12?

PaperPort 12 includes a number of valuable new features to help you manage your documents.

Improved PDF performance

PDF files can be opened more speedily and displayed in PDF Viewer Plus, a newly developed Nuance PDF handling application that is fully compatible with Adobe Acrobat. PDF Viewer Plus opens files much faster than the general-purpose ImageViewer, reducing memory requirements and permitting smaller file sizes. The new viewer optimizes the rendering resolution for each element on the page yielding a cleaner display and optimum print resolution. PDF Viewer Plus has its own Help system.

Enhanced support for PDF files

PDF Viewer Plus provides a wide range of new PDF features including improved annotations and dynamic or transparent stamps. Images within a PDF document processed by PDF Viewer Plus can be sent to the ImageViewer to be enhanced using SET tools, with the modified image returned to the PDF.

Fill and e-mail PDF forms and create new ones, either from scratch or by using an updated FormTyper integrated into PDF Viewer Plus to instantly make any static form fillable.

It uses Logical Form Recognition™ technology to detect the form elements and also allows their properties to be managed better than ever before.

Searchable PDF files are now available through Scanner Profiles, through a right click 'Save As' operation on the PaperPort Desktop, or directly in PDF Viewer Plus. This makes the content of your scanned paper documents or image files accessible to search engines such as Windows Desktop Search or Google.

Tab-and-ribbon User Interface

PaperPort 12 is now easier to use because all the program features are presented on a set of tabbed ribbon style toolbars with controls placed in functional groups. We've also added the new 'Scan Now' button so you can scan with one click without having to change to the scanner settings view. A customizable Quick Access Toolbar appears above the ribbon toolbars so you can put your most frequently used features in one easy-to-find place. Accelerator keys allow command activation from the keyboard; press the Alt key to see the accelerator values. Background, panel and ribbon colors can be customized.

More accurate OCR

OCR (Optical Character Recognition) scanning accuracy has been significantly increased; this is reflected in greater success when searching the content of Searchable PDF file archives. Language settings can now be applied to Optical Character Recognition to provide even greater accuracy in all supported languages.

Digital camera input

The Send To bar options for text applications have been updated to include a PaperPort OCR option for digital camera correction. It is now possible to take a picture of a document and accurately convert it into a text document. This is done by applying special 3D-deskewing algorithms that flatten page images and correct distortions to increase the accuracy of the resulting text document.

Making PaperPort more reliable

Sometimes PDF files may become corrupted so that they can no longer be opened. In these cases PaperPort may not be able to generate a desktop thumbnail and this may prevent PaperPort from launching properly. A new utility program `CheckPPFolders.exe` is supplied in the PaperPort program folder, along with a short Help file. Run this program to identify and remove any corrupt files so that PaperPort will work properly.

The following advanced features are available only in PaperPort Professional 12:

Folder Management

You can now automatically create multiple folders by importing a list of folder names from a text file. This option is available when you right-click on any folder. See the Help topic *About PaperPort folders* for the required syntax.

New features in PDF Viewer Plus and PDF Create Assistant

You can create industry-standard text-based PDF documents from any application directly with a right-click through the Windows or PaperPort Desktops (up to PDF version 1.7), using the PDF Create Assistant or by printing directly from any application with the printer driver called 'ScanSoft PDF Create!' Additionally you can create PDF packages, batch create PDF files and much more using the PDF Create Assistant. A table in the Help topic *About creating PDF files* summarizes which starting places, inputs, options and targets are available.

Support for SharePoint

PaperPort Professional 12 is able to communicate with the Microsoft SharePoint Services 2003, SharePoint Portal 2003, SharePoint Services 2007 and SharePoint Server 2007 document management systems: get files from there, process them as desired, and then save the results by sending the output files back through the Send To bar. ScanDirect supports scanning to PDF with the results directed to SharePoint.

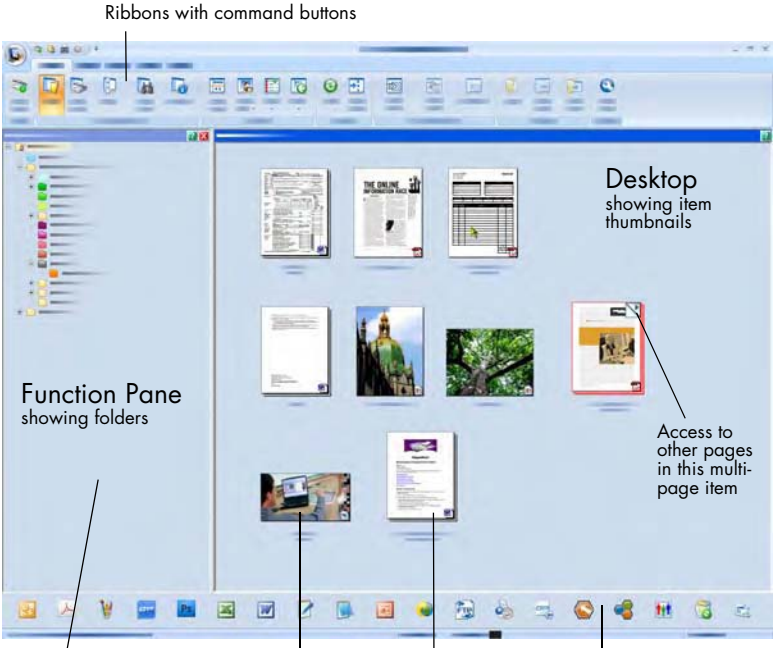
PaperPort is also supplied in Special Editions to selected scanner manufacturers and other resellers. The feature set in these editions may vary, in line with each vendor's requirements.

Getting to Know PaperPort

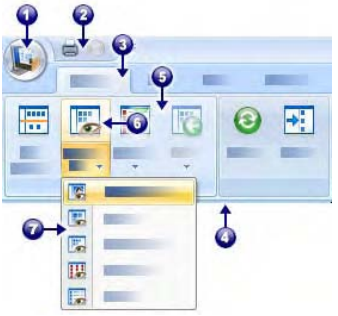
This section introduces you to the different parts of PaperPort. Refer to the PaperPort Help for detailed information about all these topics.

The PaperPort desktop

The PaperPort desktop appears with the Folders pane when you first start the program. It displays the documents in the chosen folder as thumbnails and provides tools to manage them. PaperPort offers all the tools necessary to organize, find, and use documents and images. Choose Options from the Desktop ribbon and go to the Desktop panel to choose a color scheme for the desktop and its elements.



The PaperPort Ribbon



PaperPort 12 and ImageViewer have a modernized tab and ribbon interface. The main elements are:

1. The PaperPort button
2. Quick Access Toolbar (see page 20)
3. Tab
4. Ribbon associated with the tab
5. Group inside the ribbon
6. Button within the group
7. A button drop-down list.

PaperPort items

The documents and photographs you acquire in PaperPort are called items. There are two types of items: **image items** and **text items**.

- **Image items** are scanned documents, photographs, drawings and other digital items in an image format, such as PDF Image, PDF Searchable, JPEG, TIFF, or PaperPort Image (.max) files. They can be scanned, copied or imported into the PaperPort desktop.
- **Text items** are documents that contain editable text, such as Word (.doc), HTML, and Excel files, and are created by word processing and other text-based applications. Normal PDF files are considered to be text items.

Image items when double-clicked open by default in Image View that offers many image-handling tools, including the SET tools. Go to Options > Desktop to change this behavior. You can choose ImageViewer; this offers the same functionality as Image View, but in a separate window so you can still view the PaperPort desktop as you edit the chosen item. This is specially useful in a dual-screen environment. You can also choose to open the item in the application associated with the file type.

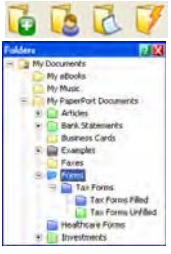
You can use any flavor of PDF file: PDF Image, PDF Searchable, and PDF Formatted Text and Graphics (PDF Normal) with PaperPort. PDF files by default open in PDF Viewer Plus or (if available) PDF Converter Professional. These Nuance programs are optimized for handling, annotating and editing PDF files. Go to Options > Desktop to change this behavior. You can open PDF Image or PDF Searchable files in ImageViewer in order to use the SET tools to improve the quality of PDF-image only items.

You can quickly send an item to another program without leaving the PaperPort program. Just drag an item onto the link icon in the Send To bar at the bottom of the desktop. PaperPort supports a wide variety of programs including word processing, spreadsheet, fax, Internet e-mail, graphics, optical character recognition (OCR), and online services programs.

PaperPort includes a **My PaperPort Documents** folder with a subfolder **Samples**, containing items to demonstrate some of the types of items you can keep on the PaperPort desktop.

You can also use PaperPort to view non-PaperPort items that reside on your computer. Simply copy or move the document file or photo into a PaperPort folder.

The Folders pane



The Folders pane presents a hierarchical view of your PaperPort folders, similar to the view you see in Windows Explorer. Use the Folder Tools to access its commands quickly.

PaperPort installs a PaperPort folder named **My PaperPort Documents** into your My Documents folder. If you are using a multi-user system, each user has their own My PaperPort Documents folder.

The My PaperPort Documents folder contains several subfolders whose names – such as Articles, Business Cards, Photographs, and Receipts – illustrate the different ways you can organize your items in PaperPort.

The Samples folder contains sample documents and photographs to help you get started using PaperPort.

When you have acquired your own PaperPort items, you do not have to use the My PaperPort Document folder to store them. You can add other local and network folders to PaperPort's Folder View. You can also delete the My PaperPort Documents folder, but your PaperPort structure must contain at least one folder.

To show or hide the Folders pane, click the **Folders** button on the Desktop ribbon. With the desktop split, Folders panes can be displayed for each Workspace.

PaperPort item thumbnails

There are two kinds of thumbnails in PaperPort: item and page thumbnails. Each item thumbnail is a small, graphic representation of your document or photo. Page thumbnails show pages of image items and PDF files in the Page Thumbnails pane both on your PaperPort desktop and in the ImageViewer.

One quick way to locate your PaperPort items is to visually browse through the item thumbnails on your PaperPort desktop. Thumbnails show you what's in a document without having to open it. Thumbnails also give you the ability to scroll through the pages of a document without opening it.

PaperPort shows large, clear thumbnails of all your documents and photos, including:

- Scanned pages and photos
- Photos from your digital camera
- Image files in formats such as BMP, TIFF, JPEG, GIF, and MAX
- Microsoft Word, PowerPoint®, Excel®, Word Perfect™ , and other documents created in popular software programs
- PDF documents
- PDF Image items
- HTML documents

Each item thumbnail appears with an icon that identifies the program in which it was created or is currently associated. This makes it easy and convenient to quickly see and find all the different types of items on your computer.

Click on a thumbnail to see image attributes:

A small icon indicates that the Read-only attribute is set for that item.

A small icon indicates that the image has annotations.

Multi-page image items show to let you scroll through the pages even with the Page Thumbnails pane closed.

Before you can work with an item, you must first select its thumbnail on the PaperPort desktop. A red border appears around an item to indicate that it is selected. Multiple selections are possible. While working with item thumbnails, you can:

- Drag a thumbnail to reposition it on the PaperPort desktop.
- Drag a thumbnail to a folder to move the item to that folder.
- Drag a thumbnail to another open Workspace to move the item to that open folder.
- Double-click a thumbnail to view the item.
- Press the **Ctrl** key and double-click a thumbnail to open the item in its source program.
- Right-click a thumbnail to display the item's shortcut menu.
- Drag a thumbnail to the Send To bar to send a copy of the item to another program.

Using item thumbnails on the PaperPort desktop, you can also easily combine individual PaperPort Image items or PDF Image items into multi-page items. This feature is useful as an organizational tool if you are using a scanner that can only scan a page as a separate item.

PaperPort page thumbnails

The Page Thumbnails pane on the PaperPort desktop and in ImageViewer displays thumbnails for multi-page image items. Select a multi-page item, then click the **Thumbnail** button on the Desktop ribbon. Page-level operations can be done quickly without having to open the files. The first three items listed below are available for all image files. The remainder are available for PDF files (both on the PaperPort desktop and in ImageViewer or PDF Viewer Plus) and MAX files (PaperPort desktop only). You can:

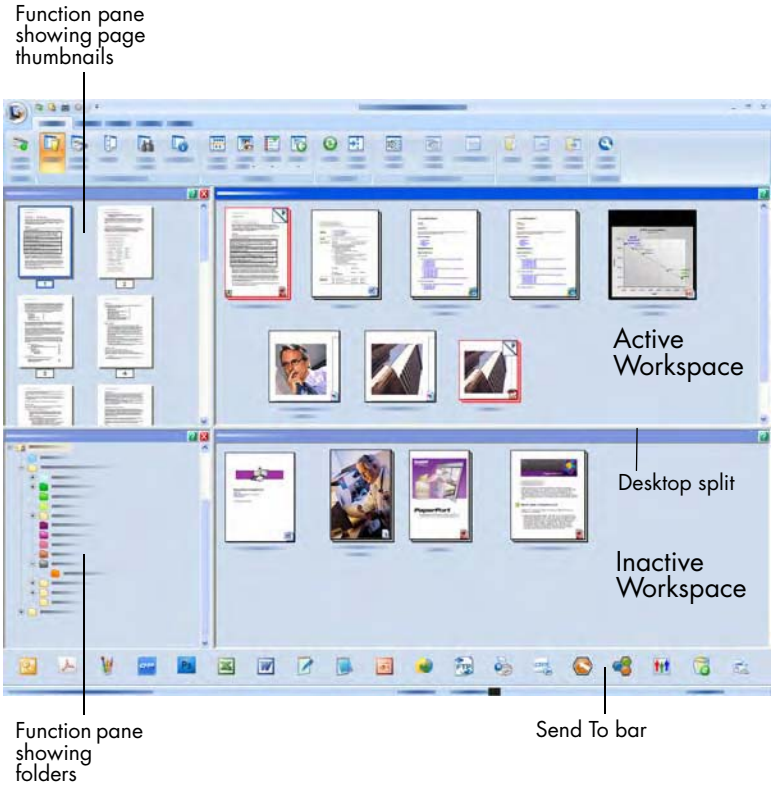
- Enlarge or reduce thumbnail size.
- Copy and move selected pages to a Workspace as separate PDF files.
- Copy and move pages between documents open in different panes.
- Copy, paste, cut, delete and reorder pages.
- Insert new pages at a certain location in the document.
- Append new pages at the end.

The Page Thumbnail view of a secure PDF is only available by supplying its password.

Two-part desktop

When you first start PaperPort Professional 12, the desktop appears split into two Workspaces – top and bottom. This layout gives you a better oversight necessary to organize and combine your documents more effectively even in a cross-folder fashion. Right-click the active Workspace or use the **Change View** button to change the way of viewing. If you work with documents containing multiple pages, you can use the corresponding function pane to view page thumbnails without having to open the given document. You can also use these desktop areas to view your folders, or the properties of the selected item. To remove the desktop split, open the Desktop menu, and uncheck the Split Desktop menu item or click the Split Desktop icon.

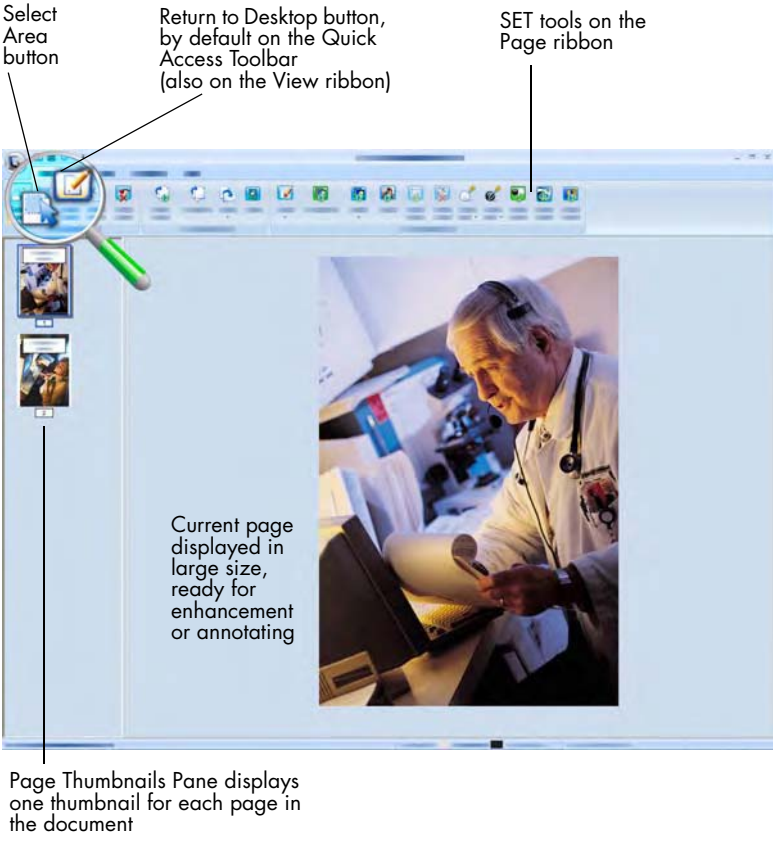
You can also bookmark the Workspaces of your choice by using the **Bookmark Workspace** command from the Desktop menu. To manage them, use the **Organize Bookmarks** command. Getting to a frequently used Workspace is just a mouseclick away, since they are all displayed in the same list.



The Image View window

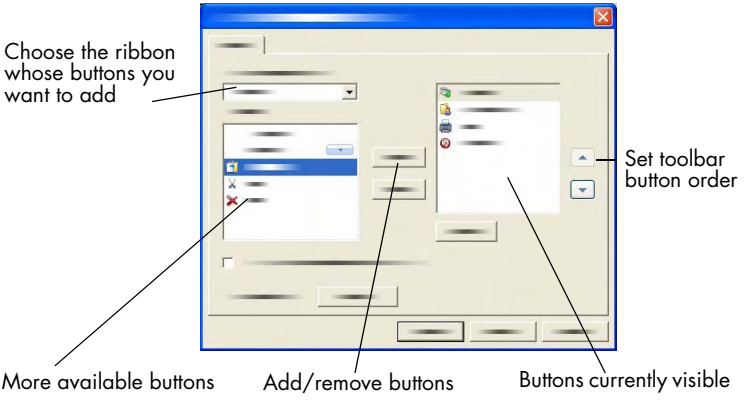
To view an image item in the Image View window, double-click its thumbnail in Desktop view, or choose **Open with Image View** on the Desktop ribbon or from its shortcut menu. By default PDF files appear in PDF Viewer Plus, not in Image View.

The Image View window allows you to take a closer look at your items and to touch up and annotate them. You can also enlarge or reduce the view for easy reading. Use the SET tools to enhance the current page image. Use the Page Thumbnails pane to edit your document at page level.


Select Area button
Return to Desktop button, by default on the Quick Access Toolbar (also on the View ribbon)
SET tools on the Page ribbon
Current page displayed in large size, ready for enhancement or annotating
Page Thumbnails Pane displays one thumbnail for each page in the document

Customizable Quick Access Toolbar

PaperPort's buttons are placed on different ribbons according to their functionality. You can place frequently used buttons on the Quick Access Toolbar in PaperPort and also in ImageViewer. Right-click within the ribbons area and choose Customize Quick Access Toolbar.


Choose the ribbon whose buttons you want to add
Set toolbar button order
More available buttons
Add/remove buttons
Buttons currently visible

PDF Viewer Plus

PDF files on the PaperPort desktop when double-clicked appear by default in the new PDF Viewer Plus. You can drag other files onto the PDF Viewer Plus icon in the Send To bar (see page 40) to have a copy converted to PDF and opened in the PDF Viewer. The first page appears in the main screen area; a navigator panel on the left shows page thumbnails or form controls and a comments panel can be displayed along the bottom of the screen. An organizer panel on the right offers stamps. The PDF annotation tools are described on page 31. If an image-only PDF enters the PDF Viewer, the program may offer to make it searchable. If not, choose **Make Searchable PDF** from the Tools menu.

Active PDF forms can be filled in directly in PDF Viewer Plus. Static forms, for instance ones scanned to PaperPort, can be turned into fillable forms by using FormTyper, as described on page 44.

PDF files opened from the PaperPort desktop return there when you finish editing or annotating them with all the updates included.

Acquiring Items

There are many ways to bring images and documents into PaperPort so that you can use PaperPort's viewing, editing, annotation, indexing, OCR, and file management tools. For example, you can:

- Scan photos, pages, and other images on a scanning device.
- Add folders to PaperPort that already contain images and documents.
- Import files from other programs on your computer.
- Print documents from other programs to the PaperPort desktop.
- Drag or cut-and-paste images and documents from Windows Explorer, or other programs to the PaperPort desktop.
- Acquire photos from a digital camera.
- Bring files into PaperPort Professional 12 using DesktopDelivery.
- Capture snapshots of web pages, using a supplied but separate utility that runs on Windows XP.

Scan to the PaperPort desktop

PaperPort is designed to work with TWAIN- and WIA-compatible scanners.

Click the **Scan Settings** button to display the Scan or Get Photo pane. Choose a scan profile. Profiles are optimized for typical scanning tasks.

Then choose between using the native interface of the scanner or utilizing the new Scanner Settings pane of PaperPort for best scanning results. To use the interface of the scanner driver, mark the checkbox **Display scanner dialog box**. Leaving it empty will put the scanned item onto the active Workspace.

Turn on the Capture Assistant to add subject, author and keywords to items and (in PaperPort Professional) to view and control scanning progress.

When the scan is complete, you will see your item on the PaperPort desktop.

If your scanner does not use a TWAIN or WIA device driver, use the program that came with your scanner to scan items. Then, copy or move the scanned items to PaperPort. Refer to the PaperPort Help for more information about scanning.

PaperPort makes it easy to scan pages as separate items or as a multi-page item. To scan and collate two-sided pages on your ADF scanner, flip the pages when prompted, click **Scan Other Side**, and PaperPort will automatically scan and collate the pages in the correct order.

You can also use your scanner device buttons to scan directly into PaperPort. Open the Windows system Control Panel, choose Scanners and Cameras, choose an event in the Events tab, and assign PaperPort to it.

You can also use a high-speed, networked scanner to scan items to a networked folder and then add the folder to PaperPort. Use DesktopDelivery (available in PaperPort Professional 12) to monitor folders for incoming scanned images.

Set up your scanner with PaperPort

Before using PaperPort for scanning, your scanner should be installed with its own scanner driver software and tested for correct functionality. Scanner driver software is not included with PaperPort.

Properly installed and correctly functioning scanners are immediately available in PaperPort by clicking the **Select** button, and choosing one in the **Available Scanners** dialog.

If you are not satisfied for your scan results, you can run the PaperPort Scanner Setup Wizard from the Start menu, under the program group PaperPort 12.0.

Using Scan Profiles

PaperPort comes with scan profiles optimized for typical scanning tasks. Choose Black and White, Grayscale or Color Document, Color Photograph or Color Searchable PDF Document.

Scan profile panels have the following tabs:

- **Profile**: displays the currently used scan profile.
- **SET**: define what enhancements you would like to run automatically.
- **Output**: set file format and automatically suffixed file names.
- **Scan**: adjust scan settings: mode, resolution, size, orientation, filter color, brightness and contrast

In PaperPort Professional 12, you can also add new profiles, or remove existing ones. This edition of the program contains an extra scan profile: Color PDF-MRC High Compression. MRC is a technology that lets you make much smaller PDF files.

Print to PaperPort

To bring items in from other programs, print them to the PaperPort desktop as PDF Image, PDF Searchable or PaperPort Image (.max) items. The default is PDF Image; go to Desktop > Options > Item to change it. This lets you quickly import spreadsheets, pictures, database files, word processing files, and other files into PaperPort as items on the PaperPort desktop. This works through the File menu (or equivalent) in the source application; choose Print to PaperPort or choose Print, then choose PaperPort Image Printer.

With PaperPort Professional, you can use PDF Create add-in buttons in Office applications to make a PDF from the current document or attachment in the Formatted Text & Graphics (PDF Normal) format. Do this also by choosing Print and selecting the printer named **ScanSoft PDF Create!**.

Choose Print in your web browser to create print-formatted views of web pages. The printer PaperPort Image Printer gives you MAX, PDF Image or PDF Searchable files, the ScanSoft Printer gives you Normal PDF.

In all cases, PaperPort is launched if not running and the PDF file is placed on the current desktop.

Capture web pages

You can use Web Capture to capture web pages on the Internet as PaperPort Image items or PDF Image items on your PaperPort desktop. These items function as convenient pointers to your favorite web sites.

Once you capture a web page, you can view it, archive it, go to the actual web page on the Internet (MAX items only), or index the content of captured web pages. This program is installed along with PaperPort, but is not integrated into it. Go to the program folder and run `PPwebcapture.exe`. It functions only on the Windows XP operating system. A short Help file is available at the same location.

Use the Print to PaperPort feature to create print-formatted views of web pages, which can also be added to the All-in-One Search index for searching by text content.

Add PaperPort folders

PaperPort provides an easy-to-use filing system for organizing your items and sharing them with others. In the Folders pane, you can:

- Add existing folders on your computer to the Folders pane.
- Create new folders, mapped network drives and folders on external attached devices.

Initially, the Folders pane shows a set of folders designed to help you get started using PaperPort. You can move or delete these folders whenever you prefer. If you choose a custom installation, you can add your own folders at that time.

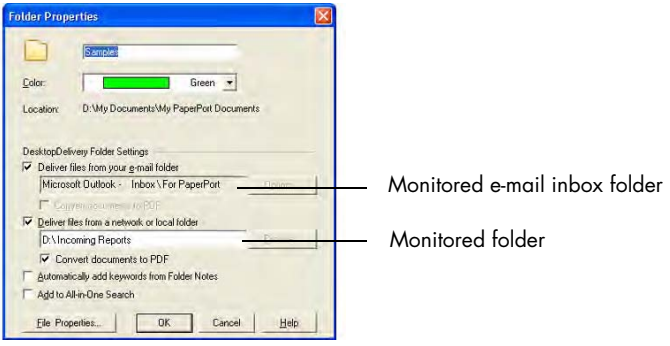
Any time later, you can add folders already on your computer to the Folders pane, including network folders and folders on external devices attached to your computer. Documents within these folders are then available for use within PaperPort.

Refer to the PaperPort Help for more information about adding and using PaperPort folders.

Use Folder Notes to assign the same file information to all PDF or MAX files arriving in a folder of your choice through scanning or DesktopDelivery.

Use DesktopDelivery

DesktopDelivery (PaperPort Professional 12 only) monitors network or local folders for incoming files of specified types (PDF, TIFF, JPEG and MAX). It can also monitor e-mail folders for attachments. It imports these files to specified PaperPort DesktopDelivery folders (i.e. PaperPort folders designated to receive files from a monitored folder outside PaperPort). Right-click on any PaperPort folder and select **DesktopDelivery** from the shortcut menu.



You can auto-add item properties to PDF and MAX files entering the selected DesktopDelivery folder. Refer to the PaperPort How-to-Guides or Help for details.

Import pictures from your camera

To bring digital photos on the PaperPort desktop, first plug your camera in. If your device is displayed as a drive you can start acquiring your files. If your camera does not support this kind of operation, and its driver is installed properly, its TWAIN or WIA interface will display enabling you to import images from it.

Do not edit the images on your camera in place – not all editing produces the desired result first time. Instead, bring your files into PaperPort and use the SET tools to enhance them.

Touching Up Images

When you display an image item in the Image View window, PaperPort provides several tools you can use to adjust or improve your image.

For example, you can straighten a scanned page, lighten an underexposed photograph that is too dark, adjust the color in a color picture, remove 'dirt spots' from a document page, clear shadows and spots from page edges, or sharpen fuzzy pictures. In addition, you can rotate an item, remove stray dots, enhance lines, remove red eye, and crop part of an image.

Some SET Tools are primarily designed for photo, or image enhancement, while others (shaded) help you prepare items containing text for Optical Character Recognition (OCR). In the Image View window the Page ribbon contains the SET tools to modify the current page. Some of these tools are also available on the PaperPort desktop for use with all pages in the selected item. The availability is shown like this:

P = Image View or ImageViewer (Page ribbon) to change the current page only.
PI = Also on PaperPort desktop (Item ribbon) to change all pages in selected item(s).
PM = Also in PaperPort desktop shortcut menu to change all pages in selected item(s).
PS = Also available in a Scanning Profile to modify all incoming images.

Scanner Enhancement Technology tools

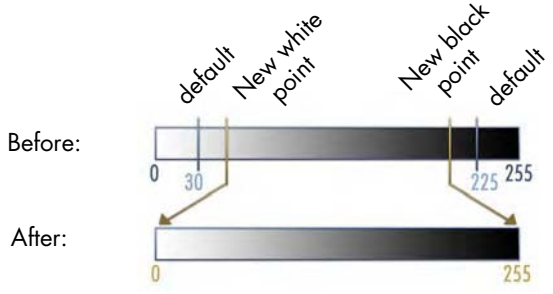
	Select Area (P)	Use the **Select Area** tool to select part of an image you want to cut, copy, or delete with commands on the Page ribbon or shortcut menu. Use it to select part of an image for cropping, using the **Remove Red Eye, Erase Inside** or **Erase Outside** tools.
	Rotate (PI)	Click the **Rotate** tool to rotate the selected page ot item 90 degrees to the left, right or by 180 degrees.
	Straighten an image	Sometimes a document is crooked when scanned. When this occurs, you can use the **Straighten** (P) and **Auto-Straighten** (PSI) tools to adjust it. Straightening lines of text in a black-and-white image file will yield better OCR results.

	Auto-enhance (PSI)	The **Auto-Enhance** feature adjusts the brightness and contrast, color, and tint of an image or item. PaperPort analyzes the image and tries to correct whatever is wrong with it.
	Enhance an image (P)	You can manually adjust your image using the **Enhance** tool. It lets you change brightness, contrast, color and tint values and choose the best result from nine candidates, as shown on page 29.
	Sharpen an image (P)	Select the **Sharpen** tool to adjust the sharpness of a blurry picture or blur a sharp image for special effect.
	Remove red eye (P)	The **Remove Red Eye** tool helps you to remove the red-eye effect from a selected part of a picture. Red Eye may occur when photographing people or animals in low light or with a flash.
	Remove part of an image	Use the Selection tool to define the part you want to keep and use the **Crop** tool (PS) to remove the remainder. Select the **Eraser** tool (P) to erase an image area that you draw over with the pointer.
	Resize (PSI)	Resize an image or item and/or change its resolution or define these settings for a scanning profile. (Colors can also be converted or inverted).
	Remove stray dots (PM)	Scanned images sometimes include dots or speckles. The **Remove Stray Dots** tool automatically finds and removes such 'dirt' from a page. Use it for better OCR results on black-and-white images.
	Improve lines (PM)	The **Improve Lines** tool (for black-and-white images) darkens lines and connects broken lines in a table or form to appear darker and straighter. The use of this tool will render better recognition results.
	Erase outside (PS)	Use this tool to clear shadows and spots from page edges to improve OCR performance. Called **Erase Edges** in the Scan profile. There is also an **Erase Inside** tool (P).

	Set white point (P)	Click this tool, then click on a light color in the image that will become the white point. See below.
	Set black point (P)	Click this tool, then click on a dark color in the image that will become the black point. The colors chosen for the new white and black points are displayed on the Status bar.
	Apply current black and white points	Click this tool to apply the new black and white points to the current image (P) or item (I). If the result is not acceptable, undo your changes and pick new values.

Changing the black and white points

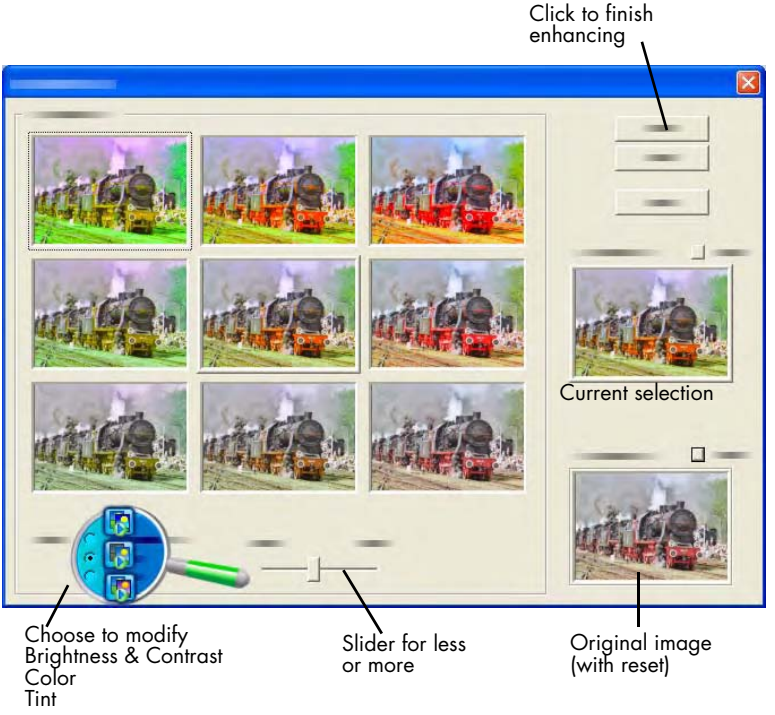
You can do this to improve image quality by removing the very dark and overexposed areas. All colors lighter than your chosen new white point will become white. All colors darker than your chosen new black point are set to black. A typical use for this is to remove a shaded gray background in a document you want to OCR. Select one of the darker gray pixels from the background and apply it as the white point. Then the background will become white. Changing black and white points for a color photo will typically increase its contrast, but may also change color values.



You can apply new black and white points to individual images, as described. You can also apply them as an auto-enhancement to all new pages scanned with a given scan profile.

Enhancing Images Manually

Choose Enhance from the Page ribbon in Image View to receive nine candidate variants of your picture. Adjust brighness and contrast, color, or tint, then double-click the desired image. It is placed in the center and becomes the new original. The first original remains and can be reset.



Edit multiple images

The ability to process items as a group is often referred to as batch processing. PaperPort provides batch processing features so that you can quickly enhance, modify, or rotate multiple image items in a single operation. Select one or more image items on the desktop, and then, on the Item ribbon, choose the desired command. See the Help for more information.

Annotating Pages

PaperPort includes a collection of annotation tools that allow you to mark up scanned documents with information you would like to keep with that document. PDF files are best annotated in the supplied Nuance PDF product. PaperPort Image (.max) files and all other image items must be annotated in Image View or ImageViewer, but remember that you can drag any of these files onto the Nuance PDF product icon on the Send To bar to have them converted to PDF Image or PDF Searchable, ready to be annotated or otherwise edited.

In PDF and PaperPort Image (.max) files, annotations are editable, meaning that you can reposition, change, remove them, or edit textual content whenever you want. On other types of image items, such as JPEG and Windows Bitmap files, annotations become a permanent part of the image when you save the item. For item types that cannot accept annotations, PaperPort automatically disables the annotation tools.

Using PaperPort's annotation tools, you can add notes and text, highlight text, draw lines and arrows, or stamp a picture onto an image item.

It is easy to send a document with annotations to people without PaperPort by using the PDF Image or PDF Searchable format. The recipient only has to double click on the e-mail attachment they receive from you and they will see the document in the system default PDF viewer – annotations intact.

Annotation tools

You can select an annotation tool from the Annotation ribbon whenever you display an image item in the Image View window. Use commands in the Annotation Settings group to change properties for future annotations created with that tool. This does not affect existing annotations. To turn off any annotation tool, click a different one – the **Select Annotation** tool is usually the best for this. See a detailed list of these tools in Help.

We detail here the annotation tools available in PDF Viewer Plus for use with PDF files.

Use the following commands in PDF Viewer Plus:

Hand	Select this tool and click in an annotation to move, cut, copy, or resize it on the page. Double-click on a note or text box to edit its text. Right-click on a selected annotation to change its status or properties.
Note	Want to give yourself a reminder? Select the **Note** tool and add a resizable note much like a sticky note that you write on and then stick on paper documents. You can shrink the note to an icon. Right-click to access note properties. Double-click to re-open the note.
Text Box	Adding a text label to your images is simple with the **Text** tool. Select this tool to enter text whose properties you can set in Edit > Preferences > Comment.
Highlight	Use the **Highlighter** tool to highlight selected text on the page or in a text box, just as you might use a highlighting pen on paper.
Pencil	The **Pencil** tool lets you draw freehand lines on the page.
Line	Select **Line** tool to draw straight lines; right-click and choose properties to make arrows and further format the line.
Stamp	The **Stamp** tool lets you paste supplied stamps or bitmapped images of your choice on the page, much like using a rubber stamp.

Protecting Items

PROFESSIONAL

In PaperPort Professional 12, you can adjust the security level of your PDF files (supported up to format 1.7). When you create a new PDF from existing ones (for example, by copying a thumbnail of a page onto a Workspace) its security settings will be the same as those of the original one. Newly created PDF files will be generated according to the default PDF security settings in PaperPort, as specified on the Item ribbon.

There are two types of passwords in the program. The open password restricts document accessibility: you can only open it by supplying the password when prompted. The permissions password allows users to define how the document may be used. If it is not specified, further use of the file is possible without any restrictions.

Filing Items

A key to organizing items in PaperPort is filing items in appropriate folders. You can drag and drop items from one folder to another or from the PaperPort desktop into any folder you want. You can specify search criteria to help you find your items later. Moving and copying items between folders is also possible in split view across Workspaces. The name of each item appears below the thumbnail in thumbnail view. In a multi-page item, the name appears below the individual page names.

Using the Folder Manager dialog box, you can add, remove, move, and rename PaperPort folders. You can change the color of a folder icon to one that helps you organize your items. You may also add, remove, move, and rename any folder in Windows Explorer that is viewed with the PaperPort folder structure. These changes will be automatically reflected in PaperPort.

In the Folders pane, you can drag and drop, copy or move subfolders and their content to other subfolders or PaperPort folders, create or delete subfolders; or add Folder Notes. Sharing and Security, and DesktopDelivery adjustments can also be directly made for each folder shortcut menu.

The **Back** button makes it easy to step through the ordered history of folders you recently visited one by one – functioning similarly to Internet Explorer – enhancing quick backward navigation for both Workspaces independently of each other.

You can add notes to folders that are relevant to their content. A customer name, telephone number, date of birth, project ID, e-mail address are typical examples.

When scanning or using DesktopDelivery, this information can be automatically added to all PDF or MAX files entering this folder, so it is easier to search for them with the PaperPort All-in-One Search or other search utilities.

Folder Notes are automatically added only if you checkmark 'Automatically add keywords from Folder Notes' in the Output panel of the Scan Settings dialog box or (in PaperPort Professional for DesktopDelivery) in the Folder Properties dialog box.

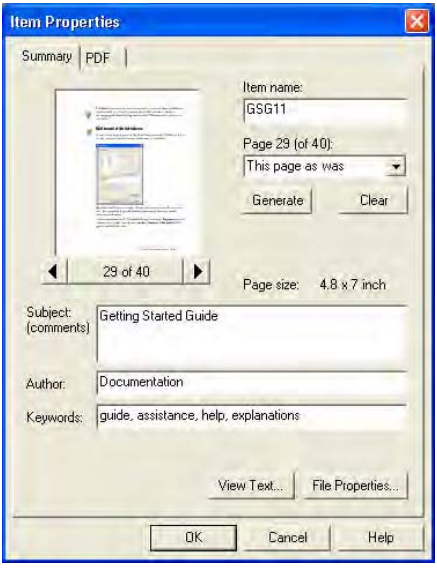
In PaperPort Professional, you can quickly import a set of folders plus any content by listing them in a plain text file with precisely this structure:

```
*** PaperPort ***
Foldername1
Foldername2
Foldername2/subfoldername2a
Foldername2/subfoldername2b
Foldername3
...etc.
```

Right-click in the Folders pane and choose Import Folder Structure to select the text file.

Add search criteria to items

You can assign item properties to PaperPort Image items and PDF files, and then use the properties as search criteria to find items in PaperPort.



PaperPort also allows you to assign the same keywords to multiple items at the same time, providing a powerful tool for organizing and locating similar documents and images.

Select multiple items on the PaperPort desktop, then choose **Properties** from the shortcut menu; words entered under **Subject, Author** and **Keywords** will be applied to all selected items.

Another way to assign the same item properties to all PDF or MAX files arriving in a folder of your choice through scanning or DesktopDelivery is to use Folder Notes. Enter words under Subject, Author and Keywords. These words are applied only if you checkmark 'Automatically add keywords from Folder Notes' in the Output panel of the Scan Settings dialog box or (in PaperPort Professional) in the Folder Properties dialog box for DeskopDelivery.

Finding Items

PaperPort provides features to help you find your PaperPort items. You can quickly find an item by visually browsing through thumbnails on your PaperPort desktop.

When you have many folders and items, PaperPort provides more powerful capabilities with All-in-One Search.

All-in-One Search provides many options for specifying where and what to look for when finding an item, including indexed text content. This information is referred to as search criteria.

You can look for items by:

- Item properties (File search)
- Text content (Index search)

Find items by their properties

You can search for any type of item by its item name.

You can also search for PDF and PaperPort Image (.max) files by item properties, such as keywords and subject information.

When you search by item properties, turn off the 'Use All-in-One Search index' checkmark, then specify criteria as follows:

- Name – item name (not necessarily that of the file).
- Author – as defined under Item properties.
- Keywords – as defined under Item properties.
- Comments – as defined under 'Subject' under Item Properties.
- Annotations – Notes or text labels added to PDF or MAX files.
- URL – The link texts of captured web pages.

The Author, Keywords, Comments and URL are available for PDF or MAX files only.

Find words in an item

To search for words within an item, you need to add the item to the All-in-One Search index and select **Use All-in-One index**. When you search using the index, you can find items that have been indexed by their properties, or text content, or both.

Specify search limits:

- all files in current folder but not its sub-folders
- current folder plus sub-folders
- all PaperPort folders and sub-folders.

Define search precision:

- Exact match finds words and common endings: search *look* finds *looks, looked*, etc.
- Approximate match finds as above and more: search *look* might find *lock* or *luck*.

When the search is complete, results are displayed – each as one row of a table. Select one and click the **View Text** button to see your search phrase occurrences in their context. Click the **Copy Text** button to extract text from the file and place it onto the Clipboard. Right-click a result file and choose 'Open' to launch the document in its associated application. 'Open Containing Folder' switches to the file's folder with the file selected.

To filter search results using file information, turn on the relevant check-boxes under **Name, author, keywords** and specify search text here as well.

Add items to the All-in-One Search index

The All-in-One Search index uses PaperPort's OCR software to extract and copy textual content from your items, and creates a database of the words or phrases in those items, much like the index of a book. Item properties, such as name and author, are also added to the index. Although creating an index is time consuming, searching for items in the index may be much faster than searching file by file.

Using PaperPort Options available from the PaperPort button, you can specify whether you want All-in-One Search to run automatically each time you add a new item or modify an existing item. You can also set how long PaperPort should wait before starting the update process.

If you prefer, you can manually update the All-in-One Search index for all items, a single item, or all items in one or more folders. It is good practice to update the All-in-One Search index on a regular basis to shorten the length of time required to complete the process.

Use the Index Manager in PaperPort Professional 12 to create and schedule indexing tasks on a regular basis. For quick access to your regular indexing processes, launch the Index Manager directly from the All-in-One Search pane.

Use the All-in-One Search pane

Use the All-in-One Search pane to enter search criteria and select options for finding your PaperPort items.

A file search is based on item properties only. You enter the item properties in the **Name, author, keywords** box.

An index search references PaperPort's All-in-One Search index to find item properties or actual text contained within an item. You enter the item properties in the **Name, author, keywords** box and the text content in the **Containing indexed text** box.

To do an index search without a file search, enter a string in the Containing indexed text edit box and clear all six file search checkmarks.

To do a file search without an index search, turn off the Use All-in-One index checkmark and enter a string in the Name, author, keywords edit box, select as many of the six file search checkmarks as desired.

To do a file and index search on a single search string, turn on Use All-in-One Index, enter the string in the Containing indexed text edit box, make sure the Name, author, keywords edit box is empty and turn on as many file search checkmarks as desired. The search returns a list of all items that match the search string, either in file contents or file information.

To do a combined file and index search, turn on Use All-in-One Index, enter a string in the Containing indexed text edit box, enter a string (same or different) in the Name, author, keywords edit box and turn on as many file search checkmarks as desired. The search returns a list of all items that contain the specified string or strings in **both** the file contents and the file information. In other words, you are likely to find few occurrences.

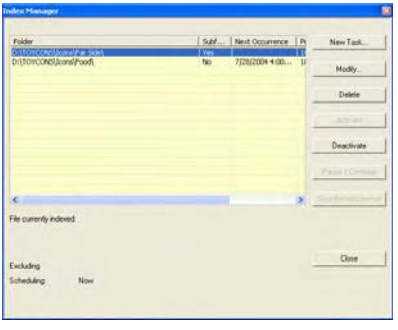
Use PDF Searchable Image

In addition to using PaperPort's proprietary search and indexing capabilities, you can also create **PDF Searchable Image** files that can be indexed and searched outside of PaperPort. PDF Searchable is a flavor of PDF; it contains a bitmapped image of a document or graphic with textual content stored as hidden text. This format maintains an identical appearance to the original document and enables other programs, such as Nuance PDF Converter Professional, Windows Desktop Search or Google to search the contents of the file.

You can create files in **PDF Searchable Image** format as follows:

- **Open** an item and choose Save As from its shortcut menu. Choose PDF Searchable Image as its file type.
- **Scan** an item using the profile 'Color Searchable PDF document'.
- **Import** an image-only PDF into PDF Viewer Plus or PDF Converter Professional. It may offer to make a searchable copy; if not select Make Searchable PDF from the Tools menu.
- **Print** an image to the PaperPort desktop. By default it becomes an Image PDF. Go to Desktop > Options > Item to specify Searchable PDF as your preference.

Schedule indexing tasks



The Index Manager is a PaperPort Professional 12 application designed to create, modify and schedule indexing tasks for a given local or network folder. Indexed files can afterwards be searched with the All-in-One Search.

For new tasks you can set which folder to browse (local or network) with subfolders included or excluded, set timing and recurrence (duration, pattern and range), activate and deactivate a task, pause its completion, or skip a task occurrence. In the program settings dialog box, you can specify how and when the Index Manager should stop.

Sharing Files

PaperPort provides many tools to make it easy for you to share files, images, and documents with friends, colleagues, and business associates.

These tools are built into the program and are readily available on different ribbons for quick access whenever you need them.

To help you share your items with others, PaperPort makes it easy to:

E-mail items to others, simply by dragging the items to your favorite e-mail program on the PaperPort Send To bar.

Scan or convert items to the PDF format, the ever-popular file-sharing format considered by many as the industry standard for document distribution.

Access shared folders located on your local or wide area network, by adding the folders to your PaperPort Folder pane.

Access Sharing and Security settings directly from the folder shortcut menu.

With PaperPort, it is simple to set up a shared folder on a server or a PC that can act as a central repository for all important office documents. Each PaperPort client can connect to that folder and use PaperPort's document management features and paper handling tools to find and use documents instantly.

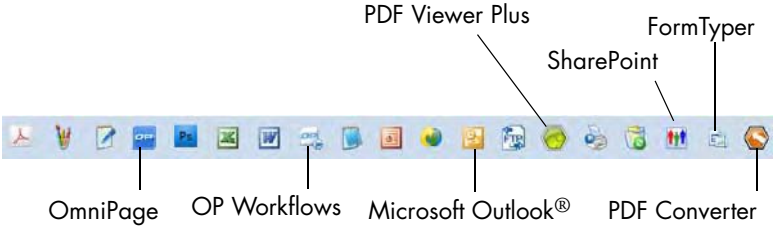
In addition, you can convert items to popular output formats for shared use in numerous other programs. To obtain a list of all supported program links, visit PaperPort at the Nuance web site at **www.nuance.com**.

Sending Items to Other Programs

Drag and drop functionality makes opening your files in your favorite programs a snap. Simply choose the file you want and drop it onto the program icon on the Send To bar at the bottom of the PaperPort desktop.

Common office tasks like e-mailing and faxing are now faster than ever. The Send To bar makes using scanned documents in other applications easier by automatically translating the document into a form that the receiving application can understand.

For example, you can drop a scanned image of a letter onto the Microsoft Word link on the PaperPort Send To bar, and PaperPort will recognize that the application you are attempting to open needs a text file rather than an image file. PaperPort will run OCR for you, and send editable text to Word rather than a static image file.



PaperPort supports a wide variety of programs including word processing, spreadsheet, fax, Internet e-mail, graphics, optical character recognition (OCR), and online services programs. The program link on the Send To bar does any necessary conversion and may provide options for sending the item.

Use OmniPage with PaperPort

If PaperPort exists on a computer with OmniPage, its OCR services become available and amplify the power of PaperPort. You can choose an OCR program by right clicking on a text application's PaperPort link, selecting Send To Options and then selecting OmniPage as the OCR package, instead of the always available PaperPort OCR.

With OmniPage you can:

- Instantly convert paper into usable Microsoft Office documents.
- Turn PDF files into editable documents while retaining their layout.
- Automatically process images from network MFPs and scanners.
- Scan and convert documents into XML, PDF, TIFF and more.
- Share documents using e-mail, Web, XML and e-Books.

- Use OmniPage workflows for instant but effective control over document conversions.

Customize the Send To bar

You can change the way program icons appear on the Send To bar in a number of ways. Specifically, you can add programs, and remove or rearrange program icons. Refer to the PaperPort Help for details.

Adjust Send To options

You can tune Send To options to specify how you want to use a certain program on the Send To bar. For example, you can specify the file format in which PaperPort will save an item.

If you have the professional version of OmniPage 14 or above on your system, use the Send To options for the OmniPage Workflows link to choose a workflow.

To e-mail an item, simply drag and drop the item to your e-mail program on the Send To bar. Use the e-mail link options to specify the file format of the attachments and other options.

Converting Items

Using PaperPort, you can convert scanned documents and text items to image formats, and convert images back to text.

Convert items to image formats

You can convert scanned documents and text items to image formats.

The **Save As** command allows you to save image items to any of a variety of standard image formats including PDF, JPEG, and TIFF, as well as the native PaperPort Image format (.max).

You can convert text items and image items to PaperPort Image items (.max) using the **Duplicate as PaperPort Image** command**.** The **Duplicate as PDF Item** command allows you to convert text items to PDF Image items.

In PaperPort Professional 12, you can also convert text items such as Word documents, to PDF Formatted Text & Graphics format using PDF Create.

By selecting more than one item, you can convert multiple items to a new format at the same time. Refer to Help for details.

Assembling documents

You can assemble documents by combining them. The files to be selected need to be in a single folder and selected in the order you want them in the stack. Click the arrow next to **Combine Items** and choose one of the available combinations:

- **Combine into PDF Stack**: Each original page becomes one PDF page with no resizing.
- **Combine into Multi-item PDF Pages, Resize to fit**: This resizes the contributing items and always places four original pages onto a single PDF page.
- **Combine into Multi-item PDF Pages, Maintain original sizes**: This places as many original pages onto each PDF page as it can.
- **Combine into Thumbnail PDF Page**: This creates thumbnails of all item pages and fits as many as possible on a PDF page.

The original items remain in their original file types.

Combining usually takes more time than stacking because of PDF generation.

PaperPort Professional can additionally combine text items. To convert a text item, the application that created it must be available on your system.

Convert images to text

You can convert scanned documents to text by a simple drag and drop of the thumbnail to your word processor program. PaperPort automatically processes your scanned document using PaperPort's OCR software, launches your word processing program, and loads the scanned text into a document ready for editing. PaperPort also allows you to copy text from part of an image item for use in a text editing, word processing, or spreadsheet program. The OCR software processes the text and copies it to the Windows Clipboard. Open the program in which you want to insert the text, and use Paste to paste the text in a file.

Filling Forms

Active PDF forms can be filled using your PDF product. Choose the Hand tool and step through the form fields using Tab or arrow keys, making choices and entering texts. Help and the How-to-Guides list all the possible form control types.

FormTyper™ is a PaperPort program that enables you to fill in static forms, such as insurance forms, registration cards, and medical forms, that you scan to the PaperPort desktop.

You simply drag a form from the PaperPort desktop to the FormTyper program on the Send To bar. The form is converted to PDF if necessary and opened in your Nuance PDF product. FormTyper automatically analyzes the form, recognizes the blank areas in which data can be entered, and creates blank fields for the data. FormTyper can detect edit boxes and checkmarks.

Now, you can quickly type and tab to each field. You can also quickly reposition edit box or checkmark fields, insert new fields, and remove fields as necessary. After you enter data and complete the form, save the form to the PaperPort desktop so that you can print or e-mail the form in its entirety with its completed data.

If you have a pre-printed form, choose **Form Fields Only** in the Print dialog box to print your responses directly onto the form.

PDF File Support

PDF Flavors

PDF (Portable Document Format) files are often classified into three different types, commonly called flavors:

- PDF Image
- PDF Searchable Image
- PDF Formatted Text & Graphics (PDF Normal)

Opening PDF files

PaperPort can open and display PDF files of all three flavors. PDF files by default open in PDF Viewer Plus or (if available) in PDF Converter Professional. They can be opened as PDF Image in ImageViewer. Protected files can be accessed by giving the correct password. Security limitations are respected and can be changed if you can provide the Permissions password.

PDF page operations

In PaperPort you can insert or append pages from one PDF file to another and also stack a set of PDF files into a single one. With pages of different flavors, the program determines a single flavor for the resulting file. You can unstack one or all pages from a multi-page PDF file to get one PDF per page.

Combining items into a PDF file

You can combine a wide range of image items into a single target PDF. All combined items remain in their original locations and file types. In PaperPort Professional text items can also be combined.

Annotating PDF files

You can add notes, highlights and graphic items like arrows to PDF pages of any flavor as annotations. These do not become part of the real PDF page, but exist on a separate layers so they can be viewed, moved, changed or deleted in PaperPort or other PDF viewing and editing programs. Annotation can be done in ImageViewer or your PDF product.

Modifying PDF files

Use SET tools to improve the appearance of PDF pages or prepare them for more successful text recognition (OCR). See page 26 and the Help topic: *About enhancing pages and images*. To modify the real text content in a PDF file, or change its color or attributes, you need a PDF editor such as Nuance PDF Converter Professional.

Extracting text from PDF files

The Copy Text command finds text in PDF files and places it onto the Clipboard as plain text, running OCR if necessary. The command View Text does the same, but displays the text in a PaperPort window. You can choose to have these texts stored or not; if not it is regenerated each time the command is used. Send PDF files to word processor programs on the Send To bar. This delivers editable text with a defined level of formatting, using OCR if necessary. See the Help topics: *To convert scanned documents to text* and *Output options* for the target program.

Adding document information to PDF files for searching

You can define an item name, author, subject and keywords to a PDF file and also assign page names to each page to help in searching. See the Help topic: *Assigning properties to PaperPort Image and PDF files* and *Item properties.* The All-in-One search finds words in this document information for one or more PDF files. You can search through document information only, through text content only, or both, with different search strings for each search type. Indexing via the Index Manager makes full text searches much faster.

Saving PDF files to other file types

You can save PDF files to a range of image file types and to XPS files. See Help: *About saving timage items.* A multi-page PDF results in a single file when a multi-page file type is selected, otherwise each PDF page becomes a separate file.

Adding PDF files to Windows Desktop Search

Go to Desktop > Options > Advanced to enable or disable PaperPort as the agent for handling PDF files in Windows Desktop Search.

For more information see Help: *About PDF files* and *About creating PDF files.*

Creating PDF Documents

Create PDF Image files from other applications

In Desktop > Options > Items check that PDF and not MAX is selected as the target file type; choose between PDF Image ans PDF Searchable. Then open a source file in a suitable application and choose Print, typically from the File menu. Choose PaperPort Image Printer and make print settings, e.g. black-and-white versus color conversion. See the Help topic *About the PaperPort print driver* and *Printing to PDF from other applications.*

Create PDF Searchable files from scanning

Open a scanning profile and set the PDF file type in the Output panel or choose the supplied profile **Color Searchable PDF Document**. See the Help topic *Modifying Scan Profiles.* Use the profile to generate PDF files.

Create a PDF from an existing PDF, XPS or image item

Right-click on a PDF file and choose Duplicate Item, Duplicate Current Page or Save As. The flavor of a source PDF is retained for the copy. Right click on an image item and choose **Duplicate as PDF** or **Save As**. When you double-click an XPS file so that it opens in PDF Viewer Plus, a copy is automatically created as a PDF file, ready to be modified and saved.

Creating PDF Documents with PDF Create

Nuance® PDF Create lets you create PDF files from one or more source documents. The PDF files will be viewable, printable, searchable and editable.

How to Start PDF Creation

You can start PDF creation from different locations:

- from the Start menu through the Create Assistant
- from Windows Explorer or from your desktop using a shortcut menu
- from Microsoft Word, Excel, PowerPoint, Outlook or Internet Explorer using a toolbar or the PDF Create menu items or the Nuance PDF ribbon.

The Help topic *About creating PDF files* details all the possible starting points for PDF creation and the available choices.

You can create one or more of these PDF flavors, depending upon your version of PaperPort software. Refer to the PaperPort Help for additional details.

This table lists which features are available for creating each type of PDF in PaperPort 12 and PaperPort Professional 12:

Format	PaperPort 12	PaperPort Professional 12
PDF Image	Scan or Get Photo Print to PaperPort Save As (Web Capture)	Scan or Get Photo Print to PaperPort Save As (Web Capture) Duplicate Item
PDF Searchable Image	Scan or Get Photo Print to PaperPort Save As (Web Capture)	Scan or Get Photo Print to PaperPort Save As (Web Capture) Duplicate Item
PDF Formatted Text & Graphics	Scan or Get Photo	Scan or Get Photo Print to PaperPort Duplicate Item Duplicate as PDF

Web Capture must be run outside PaperPort. See page 23.

Duplicate item transmits the PDF flavor of the original to the copy.

Duplicate as PDF accepts non-PDF files as input.

How to Get Help for PDF Create

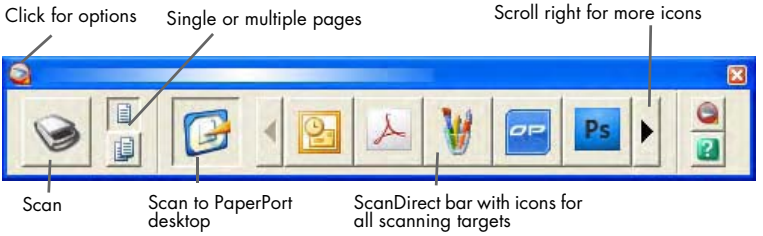
Nuance PDF Create has a comprehensive HTML Help system. Access it through the Help system in PDF Viewer Plus or PDF Converter Professional or through the PDF Create menu in Microsoft Word, Excel or PowerPoint.

Press F1 to open Help at the topic describing the currently open panel.

Using ScanDirect

ScanDirect™ is a PaperPort program that enables you to scan items and send them directly to PaperPort or other programs on your computer without first running PaperPort.

ScanDirect runs as a separate program from the Windows **Start Menu** and displays the ScanDirect bar.


Click for options
Single or multiple pages
Scroll right for more icons
Scan
Scan to PaperPort desktop
ScanDirect bar with icons for all scanning targets

Using ScanDirect, you can scan an item and immediately send it to either:

- A program on the ScanDirect Send To bar – Icons on the ScanDirect bar represent the programs that are linked to PaperPort and to ScanDirect. To scan and then send an item to a certain program, click the program icon, and then scan the item. ScanDirect will automatically start that program when the scan is complete.
- The PaperPort desktop – To scan and then work with the item in PaperPort, click the PaperPort icon, and then scan the item. When the scan is complete, PaperPort starts and displays the item in PaperPort. You can then use all of PaperPort's features on the item.

When ScanDirect is used to scan to other programs it always works through the scanner's own user interface; the scan profiles in PaperPort are not used.

When ScanDirect is used to scan items to the PaperPort desktop, the output is determined by the output setting for the previous scan: if it created an image item, the current scan will also do this, and if it created a text-type document (such as DOC, XLS, WPD, TXT or CSV) the current scan will create a PDF Image, which you can make searchable, as already described.

In PaperPort Professional, you can scan items directly to Microsoft SharePoint.

Uninstalling PaperPort

For a full uninstallation, three PaperPort components should be removed, one after the other, in any order. The components are PaperPort 12, PaperPort Image Printer and PDF Viewer Plus. Removing only the image printer and/or the PDF Viewer will cause PaperPort to function incorrectly.

1. Select Add/Remove Programs from the Control Panel.
2. Select Nuance PaperPort 12.0.
3. Click **Remove** to uninstall the program.
4. Repeat this for the remaining components.
5. A computer re-start is needed to complete the removal.

A de-activation step is performed at the start of un-installation, allowing you to reinstall the program later without re-activation problems. De-activation and re-activation require web access.

PaperPort is protected by the following US patents and foreign counterparts: 6,262,732; 5,077,807; 5,235,651; 5,261,009; 5,278,918; 5,278,920; 5,347,595; 5,381,489; 5,436,983; 5,657,397; 5,778,092; 5,862,259; 6,038,342 and 6,047,251.

If you cannot resolve a problem

- Read the Troubleshooting tips in the PPDM Desktop Module online help.
- Read the **PPDM Desktop Module Release Notes**. On the PPDM Desktop Module Help menu, click **Release Notes**.
- Read the Troubleshooting documentation provided with your scanner or digital camera.
- Refer to the latest product support information at www.nuance.com.

  The web site provides information as well as third-party programs that work with PPDM Desktop Module. You can download support for linked programs for use on the PPDM Desktop Module Send To bar, view a list of supported scanners, and find answers to many frequently asked questions about using your PPDM Desktop Module software.

If you are still having a problem, please contact the manufacturer of the hardware or software with which you received this application.

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PPDM OCR Module 17

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Powered by

NUANCE

Personal Paperless Document Manager v2

Quick Reference Guide

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Welcome

Welcome to this OmniPage® 17 text recognition program, and thank you for choosing our software! The following documentation has been provided to help you get started and give you an overview of the program.

This User's Guide

This guide introduces you to using OmniPage 17. It includes installation and setup instructions, a description of the program's commands and working areas, task-oriented instructions, ways to customize and control processing, and technical information. Descriptions are based on the Windows Vista™ operating system.

In line with Nuance's environmental policy, the Guide is supplied as a PDF file only. To have a printed copy on normal sized paper, we recommend double-sided printing with two pages per sheet.

This guide is written with the assumption that you know how to work in the Microsoft Windows environment. Please refer to your Windows documentation if you have questions about how to use dialog boxes, menu commands, scroll bars, drag and drop functionality, shortcut menus, and so on.

We also assume you are familiar with your scanner and its supporting software, and that the scanner is installed and working correctly before it is setup with OmniPage 17. Please refer to the scanner's own documentation as necessary.

How-to-Guides

The How-to-Guides can be accessed from the Help menu. They are a series of mini-guides that help you get started easily by providing concise overviews of key program areas, such as getting input, image improvement, zoning, recognition, editing, proofreading, new features, and the like.

Electronic Help

OmniPage Help contains information on features, settings, and procedures. It also has a comprehensive glossary, with its own alphabetical index and a table of contents. The HTML help system has been designed for quick and easy information retrieval. Help is available after you install OmniPage.

Comprehensive context-sensitive help aims to provide just enough assistance to let you keep working without delay. It is available from dialog boxes. Press F1 in any dialog box to access it, or click the help button if the dialog box has one.

Readme File

The Readme file contains last-minute information about the software. Please read it before using OmniPage. To open this HTML file, choose Readme in the OmniPage Installer or afterwards in the Help menu.

Scanning and other information

The Nuance® web site at www.nuance.com provides timely information on the program. The Scanner Guide (http://www.nuance.com/scannerguide/) contains up-dated information about supported scanners and related issues; Nuance tests the 25 most widely used scanner models. Access Nuance's web site from the OmniPage 17 Installer or afterwards from the Help menu.

Tech Notes

The web site at www.nuance.com contains Tech Notes on commonly reported issues using OmniPage 17. Web pages may also offer assistance on the installation process and troubleshooting.

New features in OmniPage 17

If you are upgrading from version 16, you benefit from the following innovations. Click the links to for more information.

- **Asian recognition:** OCR services are provided for Japanese, Korean, Simplified Chinese and Traditional Chinese, with support for both horizontal and vertical text flow and embedded English texts. Results can be viewed and verified in the Text Editor. See "Asian language recognition" on page 61.
- **Vertical non-Asian texts:** Auto-detection of vertical texts in two rotations functions inside table cells and anywhere on PDF or XPS pages, and in certain cases on other image file types. New tools allow vertical text zones to be drawn manually. Texts display vertically and can be edited in the Text Editor, using the True Page® formatting level. In other levels the texts are displayed horizontally. See "Automatic zoning" on page 48. and See "Zone types and properties" on page 49.
- **Easy Loader:** This provides a Windows Explorer-like display of the file system in one of the OmniPage windows, to keep files visible during your work and deliver full Explorer functionality, yielding quick file selections; a dialog box with a lock facility lets a file set be built up before loading starts. With Quick Convert View it allows

not only fast file loading but also 'one-click' total processing: load › recognize › save. See "Input via Easy Loader" on page 36.

- **Expanded ECM support:** New links are available to Hummingbird from OpenText and iManage from Interwoven. When using SharePoint, the server, login and password information must be provided only once per session, and is offered in each subsequent session.
- **Improved support for Office 2007:** The Direct OCR buttons now appear on a separate Nuance OCR tab instead of being mixed with all other Add-Ins.
- **More robust batch processing:** The Batch Manager automatically skips files that cannot be processed – including those blocked by password requirements – without stopping the main flow of work. The Job results window indicates which files were not processed.
- **Running:** The program's launch speed is increased and performance is considerably improved on multi-core computers. Support for quad-core machines is introduced.
- **Linking workflows to scanner buttons:** OmniPage functions and workflows can be associated with scanner buttons, so the whole pre-processing, recognition and storage of documents can be launched from the scanner. See "Scanning to OmniPage and workflows" on page 39.
- **Output to Kindle:** The new Kindle Assistant lets you create workflows to send recognition results to a Kindle account at Amazon and receive them displayed on a Kindle device registered with that account. See "Sending to Kindle" on page 83.

- **Other improvements:** Advances to image pre-processing provide better layout retention and overall accuracy – particularly in XPS files and document-to-document conversions. HD photo (JPEG XR) image loading is now supported. Integration with Microsoft Word, Excel and PowerPoint is enhanced. Linearized PDF files can be created, so they are optimized for faster web viewing. Form layout description is now available in Quick Convert View.

New features in OmniPage 16

If you are upgrading from version 15, you will also benefit from the following innovations:

- **Three screen views**: Choose from Classic (as in OmniPage 15), Flexible and Quick Convert View (all main controls on a single panel). See Chapter 3, page 21.
- **Multiple documents:** In Classic or Flexible View you can have two or more documents open at one time, for easy cross-document editing.
- **Digital camera processing**: perform OCR on digital camera images with special algorithms. See Chapter 3, page 35.
- **2007 programs**: OmniPage supports the latest Word and Excel inside Office 2007 (DOCX and XLSX), and also provides links for SharePoint 2007 and Outlook 2007.
- **PDF Enhancements**: these include support for PDF version 1.6, faster processing speed, higher accuracy, improved output quality, and the MRC high compression technology for certain PDF flavors.
- **Legal documents**: OmniPage offers high-quality handling and recognition of legal documents.

- **Customizable shortcut menus in Windows Explorer**: send image files or PDFs directly to major Windows programs, process them with your own workflows, or use the Convert Now Wizard for easy conversion control.
- **General improvements**: these include faster processing, better quality output page layout (font matching, table detection, etc.); and a new, intuitive Workflow Assistant.

Key features unique to OmniPage Professional.

- **Extracting data from filled forms**: A workflow step allows data to be extracted from sets of forms and exported to databases, based on a PDF form template. The forms can be active PDF forms, static forms in a range of image formats or scanned paper forms.
- **Marking and redacting**: Text can be highlighted, struckout or redacted (made unreadable) in the Text Editor. Redacting is useful for legal documents or for those with confidential content.
- **File-it Assistant**: A more efficient aid for creating and using barcode cover page workflows. These allow for automatic processing and storage of documents driven by the push of just one scanner button.

A more complete list of features, and the differences between various OmniPage versions appears in Help.

This icon is used throughout the guide to denote features that are available only in OmniPage Professional 17.

OmniPage 17 is supplied in Enterprise versions for network use. It is also supplied in Special Editions for selected scanner manufacturers and other resellers. The feature set in these editions may vary, in line with each vendor's requirements.

Installation and setup

This chapter provides information on installing and starting OmniPage.

System requirements

The minimum requirements to install and run OmniPage 17 are:

- A computer with an Intel® Pentium® III processor or equivalent. Dual-core or Quad-core support recommended.
- Windows® XP 32-bit (from Service Pack 3) with 400 MHz processor, or Windows® Vista™ 32-bit (SP1) or 64-bit (SP1) with a 1 GHz processor.
- 256MB of memory (RAM), 1GB recommended for advanced performance.
- 230MB of free hard disk space for application and sample files plus 70MB working space during installation. Additionally:
    - 170MB for all Nuance RealSpeak® modules (80MB for RealSpeak® Solo American English language module, additional 9-11MB per RealSpeak Solo other language modules)
    - 95MB for Nuance PDF Create! (Supplied with OmniPage Professional 17 only).
    - 150MB for PaperPort® (Supplied with OmniPage Professional 17 only).
- 1024x768 pixel color monitor with 16-bit color or greater video card.
- A sound card and speaker for reading text aloud.

- A CD-ROM drive for installation or web access suitable for download.
- A Windows compatible pointing device.
- 2 megapixel digital camera or higher for digital camera text capture. See Help for details.
- A compatible scanner with its own scanner driver software, if you plan to scan documents. See the Scanner Guide at Nuance's web site (www.nuance.com) for a list of supported scanners.
- Web access is needed for product activation and registration, Scanner Wizard database updating and obtaining live updates for the program.
- East Asian language handling must be installed in the operating system to view Japanese, Chinese or Korean documents. (Control Panel / Regional and Language Options).
- To save DOCX and XPSX files (for Microsoft Office 2007 Word and Excel) or to load and save XPS files (XML Paper Specification), you should have or install Microsoft .NET Framework 3.0. The link to the Microsoft download page can be found in the Release Notes, or in the application About box, if enabled under Options / General. Alternatively, click the OmniPage .Net Framework balloon tooltip.

Installing OmniPage

OmniPage 17's installation program takes you through installation with instructions on every screen.

Before installing OmniPage:

- Close all other applications, especially anti-virus programs.
- Log into your computer with administrator privileges.

- If you own a previous version of OmniPage, or if you are upgrading from demonstration software or an OmniPage Special Edition, you must uninstall that product first.

To install OmniPage:

1. Download the program file and choose Run when the download is completed, or insert the OmniPage CD-ROM in your CD-ROM drive. The installation program should start automatically. If it does not start, locate your CD-ROM drive in Windows Explorer and double-click the Autorun.exe program at the top-level of the CD-ROM.
2. Choose a language to use during installation. Accept the End-User License Agreement and enter the serial number you receive by e-mail or find on the CD envelope.
3. Choose a complete or a custom installation. A complete installation installs all RealSpeak™ Text-to-Speech language modules (currently 9). Custom installation lets you exclude or add modules. To exclude a module, click its down arrow and select 'This feature will not be available'.
4. Follow the instructions on each screen to install the software. All files needed for scanning are copied automatically during installation.

Unless deselcted in the OmniPage Professional installation, Nuance PDF Create 5 installation starts as soon the installation of OmniPage is completed. Document-to-document conversions depend on PDF Create being present.

OmniPage Professional is supplied with a complimentary copy of the Nuance PaperPort® document management product. This must be installed separately and has its own system requirements.

Setting up your scanner with OmniPage

All files needed for scanner setup and support are copied automatically during the program's installation, but no scanner setup occurs at installation time. Before using OmniPage 17 for scanning, your scanner should be installed with its own scanner driver software and tested for correct functionality. Scanner driver software is not included with OmniPage.

Scanner setup is done through the Scanner Setup Wizard. You can start this yourself, as described below. Otherwise, it appears when you first attempt to perform scanning. Proceed as follows:

- Choose Start › All Programs › Nuance › OmniPage 17 › Scanner Setup Wizard

  or click the Setup button in the Scanner panel of the Options dialog box.

  or choose Scan in the Get Page drop-down list in the OmniPage Toolbox and click the Get Page button.
- The Scanner Setup Wizard starts. If you have a web connection, the first panel invites you to update the scanner database supplied with the wizard. Choose Yes or No and click on Next.
- Choose 'Select and test scanner or digital camera', then click Next. If you have a single installed scanner, it appears, along with any scanners previously set up with OmniPage. If the required scanner is not listed, click Add Scanner... .
- You see a list of all detected scanner drivers in the checkmarked categories. This can include network devices. Select one and click OK. To install a second device, you must run the Scanner Wizard again.

- The wizard reports whether the chosen scanner model already has settings in the scanner database. If it does, you do not need to test it. If it does not, you should test it. Click on Next.
- If you chose not to test, click Finish. If you chose testing, click Next to have the scanner connection tested. If the connection is in order, you see a menu of further tests. Choose which testing steps you want to run. The Basic test scan is recommended.
- By default OmniPage uses its own scanning interface, located in the Scanner panel of the Options dialog box. If you want to use your scanner's own interface instead, choose Advanced settings... and select this. Click Hint editor... and choose Edit hints... only if you are experienced in configuring scanners or have been advised by Technical Support to do so.
- Click Next to start the tests. For the Basic scan test, insert a test page into your scanner. The wizard will scan using your scanner manufacturer's software. Click on Next. Your scanner's native user-interface will appear.
- Click on Scan to begin the sample scan.
- If necessary, click on Missing Image... or Improper Orientation... and make the appropriate selections.
- Once the image appears correctly in the window, click on Next.
- Move through the remaining requested tests, following the instructions on the screen.
- When all the requested tests have been completed successfully, the Scanner Wizard reports and invites you to click on Finish.
- You have successfully configured your scanner to work with OmniPage 17!

To change the scanner settings at a later time, or to setup or remove a scanner, reopen the Scanner Setup Wizard from the Windows Start menu or from the Scanner panel of the Options dialog box.

To test and repair an improperly functioning scanner, open the wizard and select 'Test the current scanner or digital camera' in the second panel, then work through the procedure described above, maybe using advice received from Technical Support.

To specify a different default scanner, open the wizard to reach the list of setup scanners. Move the highlight to the desired scanner and be sure to close the wizard with Finish.

To get updated settings for your current scanner, open the wizard, request a fresh database download in the first screen, then choose 'Use current settings with current device', click Next and then Finish.

How to start the program

To start OmniPage 17 do one of the following:

- Click Start in the Windows taskbar and choose All Programs › Nuance › OmniPage 17 › OmniPage [Professional] 17.

•Double-click the OmniPage icon in the program's installation folder or on the Windows desktop if placed there.

•Double-click an OmniPage Document (OPD) icon or file name; the clicked document is loaded into the program. See "OmniPage Documents" in the next chapter.

- Right click one or more image file icons or file names for a shortcut menu. Select Open With... OmniPage application. The images are loaded into the program.

On opening, OmniPage's title screen is displayed and then a view selection panel. OmniPage has three basic view types. For details, see The OmniPage Desktop and Views in the next chapter. It provides an introduction to the program's main working areas.

There are several ways of running the program with a limited interface:

- Use the Batch Manager program. Click Start in the Windows taskbar and choose All Programs › Nuance › OmniPage 17 › OmniPage Batch Manager. See the Workflows chapter.
- Click Acquire Text from the File menu of an application registered with the Direct OCR™ facility. See "How to set up Direct OCR" in the Processing Documents chapter.
- Right-click on one or more image file icons or file names in Wndows Explorer for a shortcut menu. Select OmniPage 17 and choose a target format, or the Convert Now Wizard or a workflow from its sub-menu. The files will be processed according to the workflow instructions. See the Workflows chapter.
- Click the OmniPage Agent icon on the taskbar. Choose a workflow to start the program and run the workflow.
- Use OmniPage 17 with Nuance's PaperPort document management product, to add OCR services. See "How to use OmniPage with PaperPort" in the Using OmniPage chapter.

Registering your software

Nuance's online registration runs at the end of installation. Please ensure web access is available. We provide an easy electronic form that can be completed in less than five minutes. When the form is filled, click Submit. If you did not register the software during

installation, you will be periodically invited to register later. You can go to www.nuance.com to register online. Click on Support and from the main support screen choose Register in the left-hand column. For a statement on the use of your registration data, please see Nuance's Privacy Policy.

Activating OmniPage

You will be invited to activate the product at the end of installation. Please ensure that web access is available. Provided your serial number is found at its storage location and has been correctly entered, no user interaction is required and no personal information is transmitted. If you do not activate the product at installation time, you will be invited to do this each time you invoke the program. OmniPage 17 can be launched only five times without activation. We recommend Automatic Activation.

Uninstalling the software

Sometimes uninstalling and then reinstalling OmniPage will solve a problem. The OmniPage Uninstall program will not remove files containing recognition results or any of the following user-created files:

- Zone templates (*.zon)
- Image enhancement templates (*.ipp)
- Training files (*.otn)
- User dictionaries (*.ud)
- OmniPage Documents (*.opd)
- Job files (*.opj)
- Workflow files (*.xwf)

To uninstall you must be logged into your computer with administrator privileges.

To uninstall or reinstall OmniPage:

- Close OmniPage.
- Click Start in the Windows taskbar and choose the Control Panel and then Uninstall a program (in earlier Windows versions: Add/Remove Programs).
- Select OmniPage and click Uninstall (in earlier Windows versions: Remove).
- Click Yes in the dialog box that appears to confirm removal.
- Select Yes to restart your computer immediately, or No if you plan to restart later.
- Follow instructions until the process is finished.

When you uninstall OmniPage, the link to your scanner is also uninstalled. You must setup your scanner again with OmniPage if you reinstall the program. All RealSpeak modules that were installed with the program will also be uninstalled.

With OmniPage 17 Professional, Nuance PDF Create 5 and PaperPort must be uninstalled separately.

Using OmniPage

OmniPage 17 uses optical character recognition (OCR) technology to transform text from scanned pages or image files into editable text for use in your favorite computer applications.

In addition to text recognition, OmniPage can retain the following elements and attributes of a document through the OCR process.

Graphics (photos, logos)

Form elements (checkboxes, radio buttons, text fields)

Text formatting (character and paragraph)

Page formatting (column structures, table formats, headings, placing of graphics).

Documents in OmniPage

A document in OmniPage consists of one image for each document page. After you perform OCR, the document will also contain recognized text, displayed in the Text Editor, possibly along with graphics, tables and form elements.

OmniPage Documents

An OmniPage Document (.opd) contains the original page images (optionally pre-processed) with any zones placed on them. After recognition, the OPD also contains the recognition results.

An OmniPage Document can contain an embedded user dictionary, training file, zone template file, or an image enhancement template file. This can increase file size considerably but makes the OPD

more portable. To embed a file, open the relevant dialog box from the Tools menu, select the desired file and click Embed. Use the Extract button to get a local copy of an embedded file inside an OPD you have received.

When you open an OmniPage Document, its settings are applied, replacing those existing in the program.

The OmniPage Desktop and Views

OmniPage comes with three different views to suit your task.

- **Classic View** - This view has a similar look and feel to previous versions of OmniPage.
- **Flexible View** - This view provides an alternate layout of the OmniPage function panels stacked in a tabbed view to give each panel more space.
- **Quick Convert View** - This view is designed for quick and easy document conversion without having to learn a lot. The most important conversion options are clearly visible on one screen.

Use the Window menu to switch between views and to save your own custom view (see later). On starting a new session you receive the view and screen arrangement that was in force when the program was last closed.

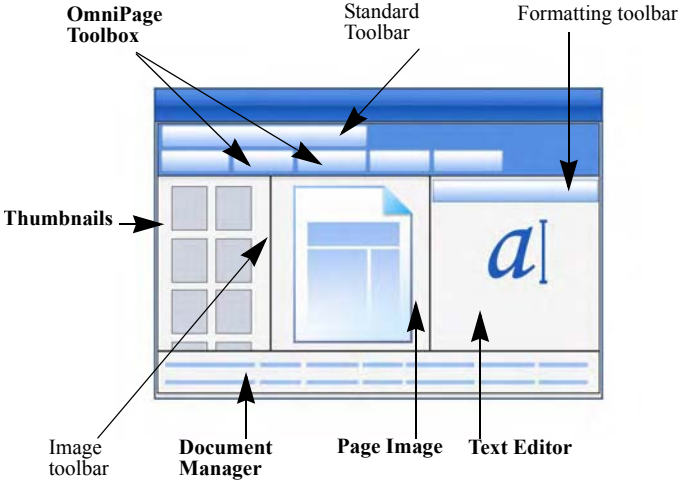
Program Panels

OmniPage has seven panels that can be docked (tabbed or tiled), floated, resized, minimized and restored separately: Thumbnails, Page Image, Text Editor, Document Manager, Easy Loader, Workflow Status, and Help. To float a panel double-click its title bar or tab. To restore the floating panel to its previous docked

position, double-click its title bar. To dock it to a new location, drag it to an edge. A purple rectangle shows the docking position - release the mouse button to dock it. To move a floating panel without docking displays, keep CTRL pushed while dragging. To see all possible docking positions one after the other (tiles and tabs), drag the panel over the OmniPage main window, holding down the left mouse button and pressing the spacebar repeatedly. When the desired location shows purple, release the mouse button.

Classic View

In Classic View, the default OmniPage Desktop has four main tiled working areas, separated by splitters: the Document Manager, the Page Image, Thumbnails and the Text Editor. The Page Image has an Image toolbar and the Text Editor has a Formatting toolbar.



OmniPage toolbox: This Toolbox lets you drive the processing.

Thumbnails panel: This displays page thumbnails.

Document Manager: This provides an overview of your document with a table. Each row represents one page. Columns present statistical or status information for each page, and (where appropriate) document totals.

Page Image: This displays the image of the current page with its zones. When a page is displayed, the Image toolbar is available.

Text Editor: Displays recognition results from the current page.

Panels can be re-arranged freely - horizontally or vertically; use the Window menu to open the Easy Loader, Workflow Status or Help panels. Panels can be minimized or closed, but not tabbed. To restore the default Classic View appearance, choose Reset Current View in the Window menu.

Flexible View

Use this view to set up the OmniPage workspace so that it fits your task optimally. By default all panels appear. There are five tabs: Page Image (including Thumbnails), Text Editor, Easy Loader, Workflow Status and Help. The Document Manager appears in a horizontal panel at the base of the working area. You can undock, move, minimize, group or close panels as already described. Drag a tab onto the working area to convert it to a Classic-type tiled panel. Drag it back to the tab bar to revert to a tabbed panel, or use the Spacebar as already described. If panels are grouped, the tab name shows the active one. To restore the default Flexible View appearance, choose Reset Current View in the Window menu.

Easy Loader provides a Windows Explorer type file listing and functionality that can remain open during the session, allowing quick file selection and assembly (see Chapter 4, page 36).

Suggested scenarios:

Maximizing workspace (single screen)

Load a document. Open the panels you want to use. Grab them by their captions one by one, and drag them so that they dock behind the active one as tabs. You can also dock Help to avoid handling two separate windows.

Working with recognition results (single screen)

Load a document and have it recognized. Close all panels except the Document Manager and the Text Editor. Maximize both horizontally, scale down the Document Manager and dock it to the top or bottom. You can now step through the pages double-clicking them one by one in the Document Manager, inspecting recognition results in the Text Editor. The number of suspect words and reject characters in the Document Manager will help you identify problematic pages.

Handling large documents (dual-screen)

Load the document you want to work on. Move its Thumbnail View to your second monitor and maximize it for a large scale overview of your document and far more space for thumbnail operations.

Verifying (dual-screen)

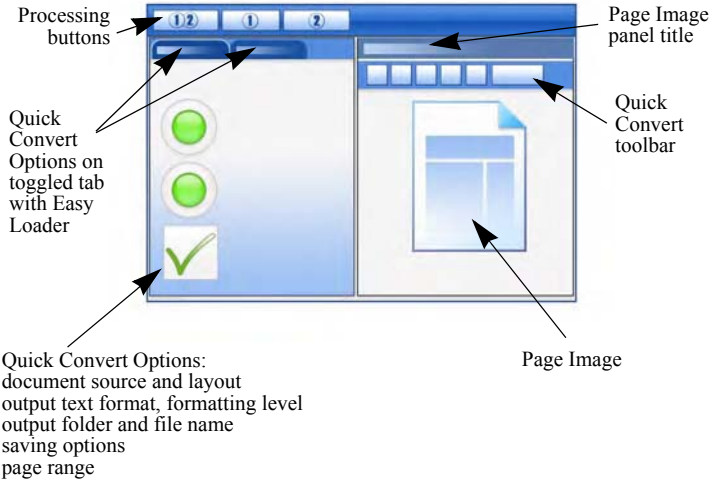
Place the Page Image on one screen and the Text Editor on the other. This gives you more space for editing and proofing.

The Page Image is always available for verifying recognition and for performing on-the-fly zoning and editing.

The scenarios presented above are only examples to give you an idea of what you can do in Flexible View.

Quick Convert View

Use the Quick Convert View for fast recognition and saving. You can switch to Quick View only when you have no opened document and it can handle only one input file and one output document at a time. The picture shows the default appearance.



The Easy Loader is by default on a tab that toggles with the Quick Convert Options panel. A Help panel can be added, but further panels are not available in this view. You can change tabs to separate panels and minimize them, as in other views.

After loading a file, you should convert it before loading the next file. When an image conversion is finished, you do not need to explicitly close the image; just load a new file.

The Easy Loader in Quick View provides an additional feature: 'one-click' processing. Choose the Easy Loader sub-menu in the Process menu and choose either Load Files or Get and Convert. When the latter is chosen, multiple files can be selected – these files are loaded, recognized and saved using the current settings. For this, set the output file names to be the same as the source file names. See Chapter 4, page 36 and Help for detail.

The Quick View Page Image panel includes the Quick Convert toolbar, offering the most useful image handling operations. To access advanced functionality, such as image file saving, SET tools, on-the-fly zoning, zone reordering and manual zone drawing for vertical text, a different view should be used.

Custom views

For a custom view, arrange the panels and toolbars as you wish, then choose Window › Custom Views › Manage. Click Add and name your view. Your screen layouts will be displayed in the Custom Views submenu with a checkmark beside the active one. Resetting to a default is not available for custom views.

Changing views

Use the Window menu to change views. Panels are shown or hidden and arranged as they were when the chosen view was last

used. The Help topic on display remains unchanged regardless of view. Easy Loader retains its file location regardless of view and the Workflow Status continues to display information on the last workflow run. On program restart, Help displays the Welcome topic, Easy Loader the default folder location and Workflow status is empty.

The Toolbars

The program has eleven main toolbars. Use the View menu to show, hide or customize them. Status bar texts at the bottom edge of the OmniPage program window explain the purpose of all tools.

Standard toolbar: Performs basic functions.

Image toolbar: Performs image, zoning and table operations. Three of its tool groups can now be handled separately (mini-toolbars):

- Zones toolbar: Offers zoning tools.
- Rotate toolbar: Provides rotating tools.
- Table toolbar: Inserts, moves and removes row and column dividers.

Formatting toolbar: Formats recognized text in the Text Editor.

Verifier toolbar: Controls the location and appearance of the verifier.

Reorder toolbar: Modifies the order of elements in recognized pages.

Mark Text toolbar: Performs text marking and redacting.

Form Drawing toolbar: Creates new form elements.

Form Arrangement toolbar: Arranges and aligns form elements.

All toolbars can be moved and customized in each view to your particular needs, including use of a secondary monitor.

The Form toolbars and the Mark Text toolbar (for details see Chapter 4, page 69) appear only in OmniPage Professional 17.

Basic Processing Steps

There are three ways of handling documents: with automatic, manual or workflow processing. The basic steps for all processing methods are broadly the same:

1. Bring a set of images into OmniPage. You can scan a paper document with or without an Automatic Document Feeder (ADF) or load one or more image files.

2. Perform OCR to generate editable text. After OCR, you can check and correct errors in the document using the OCR Proofreader and edit the document in the Text Editor.

3. Export the document to the desired location. You can save your document to a specified file name and type, place it on the Clipboard, send it as a mail attachment or publish it. You can save the same document repeatedly to different destinations, different file types, with different settings and levels of formatting.

Using OmniPage, you can choose from the following processing methods: Automatic, Manual, Combined, or Workflow. You can start recognition from other applications, using Direct OCR and can also schedule processing to run at a later time.

Processing methods are detailed in the next chapter and in Help.

Settings

The Options dialog box is the central location for OmniPage settings. Access it from the Standard toolbar or the Tools menu. Context-sensitive help provides information on each setting.

How to use OmniPage with PaperPort

The PaperPort® program is a paper management software product from Nuance. It lets you link pages with suitable applications. Pages can contain pictures, text or both. If PaperPort exists on a computer with OmniPage, its OCR services become available and amplify the power of PaperPort. You can choose an OCR program by right-clicking on a text application's PaperPort link, selecting Preferences and then selecting OmniPage 17 as the OCR package. OCR settings can be specified, as with Direct OCR.

PaperPort provides the easiest way to turn paper into organized digital documents that everybody in an office can quickly find and use. PaperPort works with scanners, multifunction printers, and networked digital copiers to turn paper documents into digital documents. It then helps you to manage them along with all other electronic documents in one convenient and easy-to-use filing system.

PaperPort's large, clear item thumbnails allow you to visually organize, retrieve and use your scanned documents, including Word files, spreadsheets, PDF files and even digital photos. PaperPort's Scanner Enhancement Technology tools ensure that scanned documents will look great while the annotation tools let you add notes and highlights to any scanned image.

PaperPort is included in the OmniPage Professional package. For application information, refer to PaperPort's own documentation. PaperPort must be installed and uninstalled separately from OmniPage.

Processing documents

This tutorial chapter describes different ways you can process a document and also provides information on key parts of this processing.

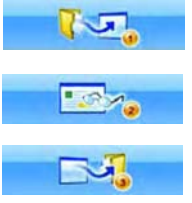
Processing methods

Using OmniPage, you can choose from the following processing methods:

Automatic

A fast and easy way to process documents is to let OmniPage do it automatically for you. Select settings in the Options dialog box and in the OmniPage Toolbox drop-down lists and then click *Start*. It will take each page through the whole process from beginning to end, when possible running in parallel. It will typically auto-zone the pages.

Manual



Manual processing gives you more precise control over the way your pages are handled. You can process the document page-by-page with different settings for each page. The program also stops between each step: acquiring images, performing recognition, exporting. This lets you, for instance, draw zones manually or change recognition language(s). You start each step by clicking the three buttons on the OmniPage Toolbox.

1. Use button one to get a set of images.
2. Manually zone pages where you want to process only part of the page or if you want to give precise zoning instructions. Use ignore backgrounds or zones to exclude areas from processing. Use process backgrounds or zones to specify areas to be auto-zoned.
3. Use button two to have the pages recognized.
4. Do proofing and editing as desired.
5. Use button three to save your results.

The default for manual processing is to have all entered pages automatically selected. This way you can have all new pages recognized by a single mouse click. You can remove this default in the Process panel of the Options dialog box.

Combined

You can process a document automatically and view results in the Text Editor. If most pages are in order, but a few have not turned out as expected, you can switch to manual processing to adjust settings and re-recognize just those problem pages. Alternatively, you can acquire images with manual processing, draw zones on some or all of them, and then send all pages to automatic processing by pressing the Start button and choosing to process existing pages.

Workflow

A workflow consists of a series of steps and their settings. Typically it will include a recognition step, but it does not have to. It does not have to conform to the 1-2-3 pattern of traditional processing. Workflows are listed in the Workflow drop-down list – sample workflows plus any you create. Workflows allow you to handle recurring tasks more efficiently, because all the steps and their settings are pre-defined. You can choose to place the OmniPage Agent icon on your taskbar.

Its shortcut menu lists your workflows. Click a workflow to launch OmniPage and have it run.

Let the Workflow Assistant guide you in creating new workflows. It provides a choice of steps and the settings they need. Click Next after each step to add another one. You can use the Assistant just to get more guidance when doing automatic processing. See "Workflow Assistant" in Chapter 4, page 89.

At a later time

You can schedule OCR jobs or other processing jobs in OmniPage Batch Manager to be performed automatically at a later time, when you may not even be present at your computer. This is done through the Batch Manager. It does not matter if your computer is turned off after the job is set up, so long as it is running at job start time. If you are scanning pages, your scanner must be functioning at job start time, with the pages loaded in the ADF.

When you choose New Job, first the Job Wizard, and then the Workflow Assistant appears - the latter with a slightly modified set of choices and settings. In the first panel of the Job Wizard, you define your job type and name your job; next you are to specify a starting time, a recurring job or watched folder instructions.

A job incorporates a workflow with timing instructions added. See "Batch Manager" in Chapter 4, page 91.

Processing from other applications

You can use the Direct OCR™ feature to call on the recognition services of OmniPage while you work in the following applications: Microsoft Office XP or higher, Corel WordPerfect 12 or X3. First you must check the Enable Direct OCR check box under Tools › Options › General. Then, two buttons in Office 2007's

Nuance OCR tab, or in an OmniPage toolbar open the door to OCR facilities.

How to set up Direct OCR

Start the application you want connected to OmniPage. Start OmniPage, open the Options dialog box at the General panel and select *Enable Direct OCR*.

In the target application, use the Acquire Text Settings button in the OmniPage toolbar (in Office 2007 go to the Nuance OCR tab). Select options in the following panels:

- **OCR:** languages, dictionaries, layout, fonts.
- **Process:** Image pre-processing, choices for PDF opening, feature retention.
- **Output format:** Set a formatting level
- **Direct OCR:** Automatic or manual zoning, perform or skip proofing, image source.
- **Scanner:** Set-up or change scanner settings.

These function for future Direct OCR work until you change them again; they are not applied when OmniPage is used on its own.

How to use Direct OCR

1. Open your application and work in a document. To acquire recognition results from scanned pages, place them correctly in the scanner.

2. Use the OmniPage toolbar button Acquire Text Settings or the same item in the target application's File menu (or the Nuance OCR tab in Office 2007) to review your recognition settings, if necessary; the Direct OCR panel lets you specify input from scanner, image file or digital camera image files.

3. Use the OmniPage toolbar button Acquire Text or the same item in the File menu (use the Nuance OCR tab in Office 2007) to acquire images from the specified source.
4. If you selected *Draw zones automatically* in the Direct OCR panel of the Options dialog box, under Acquire Text Settings, recognition proceeds immediately.
5. If *Draw zones automatically* is not selected, each page image will be presented to you, allowing you to draw zones manually. Click the Perform OCR button to continue with recognition.
6. If proofing was specified, this follows recognition. Then the recognized text is placed at the cursor position in your application, with the formatting level specified in the Output Format panel under Acquire Text Settings.

Defining the source of page images

There are three possible image sources: from image files, from a digital camera and from a scanner. There are two main types of scanners: flatbed or sheetfed. A scanner may have a built-in or added Automatic Document Feeder (ADF), which makes it easier to scan multi-page documents. The images from scanned documents can be input directly into OmniPage or may be saved with the scanner's own software to an image file, which OmniPage can later open.

Input from image files

You can create image files from your own scanner, or receive them by e-mail or as fax files. OmniPage 17 can open a wide range of image file types. Select *Load Files* in the Get Pages drop-down list. Files are specified in the Load Files dialog box. This appears when you start automatic processing. In manual processing, click the Get Page

button or use the Process menu. The lower part of the dialog box provides advanced settings, and can be shown or hidden.

The minimum width or height for an image file is 16 by 16 pixels; the maximum is 8400 pixels (71cm or 28 inches at the resolution 201 to 600 dpi). See Help for pixel limits.

You can govern how PDF files are opened under Tools / Options / Process: open with the text layer or as image, import tag information to assist layout retention and whether to use PDF fonts or the mapped system fonts.

In OmniPage Professional 17, files can also be imported from FTP locations, Microsoft SharePoint 2003 and 2007, Hummingbird, iManage and ODMA-compliant sources.

Input from digital camera

You can bring digital camera photos of documents for recognition into OmniPage. First, make sure that your device driver is installed properly. Then connect the camera and download images. Click Load Digital Camera Files in the Get Page drop-down list. If you use this, 3D Deskew, resolution enhancement and straightening text lines are automatically performed on images. You can also do manual 3D deskewing, see the section "Image Enhancement tools" later in this Chapter.

To acquire digital camera photos containing text from Direct OCR or PaperPort, mark the Load as digital camera image checkbox. The above mentioned automatic enhancements will apply.

For tips and advice on working with digital camera images see the How-to-Guides and Help.

Input via Easy Loader

This provides the Windows Explorer interface in an OmniPage window. In Flexible and Quick Views it appears by default. Choose Easy Loader in the Window menu to add it to Classic View or to show or hide it in other views. It lets you browse your whole file system and efficiently select files to be loaded into OmniPage. Choose Process / Easy Loader / Folder to view files as Lists, Thumbnails, Tiles, Icons (arranged as desired) or Details, as you do in Explorer. The Loader can remain displayed as you work.

Easy Loader is driven from the Process menu. Instead of selecting files to send them straight to OmniPage you can choose Queue Window to get a dialog box with a lock. Turn the lock on to build up and re-order a list of files, maybe coming from different folders. The lock applies to all files collected to enter the currently open document. When the list is ready, turn the lock off to start loading. If the lock is off from the start, files are listed only if they are selected faster than OmniPage can load them. Practically, you can load a few files, send them to recognition and while that is underway, build up the rest of the input list.

Turning on the menu item *Show/hide Queue Window automatically* causes the window to appear whenever files are listed but not yet loaded and to be closed as soon as the list is empty.

Easy Loader can be used in Classic and Flexible Views to compile files for multiple documents. Engage the lock, make document 1 active and collect files. Then make document 2 active and collect its files, and so on. When all is ready, remove the lock. Each document has its own lock, but the Process menu offers *Lock all* and *Unlock all* to lock or release all files destined for all documents. You can remove selected files with *Delete*, or all files in the current document's list with *Delete All* or *Clear* in the Process menu. Use *Clear all* to clear all files destined for all open documents. See a tutorial in Help on loading files for multiple documents.

Easy Loader is available as a panel in Quick Convert View. The Process menu has two commands unique to Quick View.

- **Get and Convert** offers 'one-button' processing - files are loaded, passed through recognition and saved to files using existing settings. Only in this case, multiple file selection is allowed with Quick View; the result is one output document for each input file – before starting you should choose under Output file name *Same as the source file name.*
- **Load Files** performs file loading without recognition, as in other views. In Quick View it allows only one file to be loaded at a time - it should be processed before selecting a new input file. In this case the Queue Window and its lock play no useful role.

Easy Loader can process digital camera images. Set this in the Quick Convert Options panel before invoking Easy Loader. If *Scan* is set as input, this setting is temporarily ignored and pages are loaded as normal (non-camera) images.

All Windows Explorer functionality is available in Easy Loader. For instance, you can also select files and use the shortcut menu item OmniPage 17 to send them via background processing to MS Excel, MS Word, PDF, RTF, Text and WordPerfect. Existing settings are used and by default generated files are placed in the input folder. Use the Convert Now Wizard to access basic settings, such as whether or not to view results in the target application. This wizard lets you do immediate conversions or call the Workflow Assistant to access all settings, for instance to change target file names and locations. This shortcut menu item also offers all workflows that have image file input.

Input from scanner

You must have a functioning, supported scanner correctly installed with OmniPage 17. You have a choice of scanning modes. In making your choice, there are two main considerations:

- Which type of output do you want in your export document?
- Which mode will yield best OCR accuracy?

Scan black and white

Select this to scan in black-and-white. Black-and-white images can be scanned and handled quicker than others and occupy less disk space.

Scan grayscale

Select this to use grayscale scanning. For best OCR accuracy, use this for pages with varying or low contrast (not much difference between light and dark) and with text on colored or shaded backgrounds.

Scan color

Select this to scan in color. This will function only with color scanners. Choose this if you want colored graphics, texts or backgrounds in the output document. For OCR accuracy, it offers no more benefit than grayscale scanning, but will require much more time, memory resources and disk space.

Brightness and contrast

Good brightness and contrast settings play an important role in OCR accuracy. Set these in the Scanner panel of the Options dialog box or in your scanner's interface. After loading an image, check its appearance. If characters are thick and touching, lighten the brightness. If characters are thin and broken, darken it. Then rescan

the page. If your scanning results are still not satisfactory, open the scanned image in the Image Enhancement window to edit it using a range of different tools.

Scanning with an ADF

The best way to scan multi-page documents is with an Automatic Document Feeder (ADF). Simply load pages in the correct order into the ADF. You can scan double-sided documents with an ADF. A duplex scanner will manage this automatically.

Scanning without an ADF

Using OmniPage's scanner interface, you can scan multi-page documents efficiently from a flatbed scanner, even without an ADF. Select *Automatically scan pages* in the Scanner panel of the Options dialog box, and define a pause value in seconds. Then the scanner will make scanning passes automatically, pausing between each scan by the defined number of seconds, giving you time to place the next page.

Scanning to OmniPage and workflows

Go to Tools / Options / Scanners to choose an action to be performed when a button on your local scanner is pushed. This can be simple scanning resulting in images loaded into OmniPage. It is also possible to select a scanner-based workflow from those you have created or choose to be prompted to select a workflow whenever the button is pressed. Use the Control Panel button to associate OmniPage with a scanner event (a scanner button being pressed). Then a button press launches OmniPage, runs the workflow and sends the results to the defined target, with or without interaction.

In OmniPage Professional this feature can also be used to initiate barcode-driven workflows (see Chapter 4, page 93).

Document-to-document conversion

In OmniPage Professional 17 you can open not only image files, but also documents created in word-processing and similar applications. Supported file types include .doc, .xls, .ppt, .rtf, .wpd and others. Click the Load Files button in the OmniPage Toolbox or select the Load Files command under Get Page, in the File menu. In the Load Files dialog box, choose Documents. When you are finished, you can choose from a wide variety of document file types for saving. These conversions require Nuance PDF Create to be installed.

Describing the layout of the document

Before starting recognition you are requested to describe the layout of the incoming pages to assist the auto-zoning process. When you do automatic processing, auto-zoning always runs unless you specify a template that does not contain a process zone or background. When you do manual processing, auto-zoning sometimes runs. See online Help: *When does auto-zoning run*? Here are your input description choices:

Automatic
Choose this to let the program make all auto-zoning decisions. It decides whether text is in columns or not, whether an item is a graphic or text to be recognized and whether to place tables or not.

Single column, no table
Choose this setting if your pages contain only one column of text and no table. Business letters or pages from a book are normally like this.

Multiple columns, no table

Choose this if some of your pages contain text in columns and you want this decolumnized or kept in separate columns, similar to the original layout.

Single column with table

Choose this if your page contains only one column of text and a table.

Spreadsheet

Choose this if your whole page consists of a table which you want to export to a spreadsheet program, or have treated as single table.

Form

Choose this if your whole page consists of a form and you want form elements auto-recognized. After recognition, you can modify form element properties, create new ones, or edit form layout. This option is available in OmniPage Professional 17 only.

Legal pleading

Choose this to recognize legal documents. Legal headers are detected and removed. Choose to have pleading numbers retained or dropped.

Custom

Choose this for maximum control over auto-zoning. You can prevent or encourage the detection of columns, graphics and tables. Make your settings in the OCR panel of the Options dialog box.

Template
Choose a zone template file if you wish to have its background value, zones and properties applied to all acquired pages from now on. The template zones are also applied to the current page, replacing any existing zones.

If auto-zoning yielded unexpected recognition results, use manual processing to rezone individual pages and re-recognize them.

Preprocessing Images

To improve OCR results, you can enhance your images before zoning and recognition using the Image Enhancement tools. To open the Image Enhancement window, click the SET - Enhance Image button in the Image Toolbar, or click Tools and choose SET - Enhance Image. You can also build Image Enhancement steps into your workflows by choosing the Enhance Images step.

The input for Image Enhancement is the Primary image.

We must distinguish three types of image:

Original image: The image created by your scanner or contained in a file before it enters the program.

Primary image: The state of the original image after it has been loaded into OmniPage, possibly modified by automatic or manual pre-processing operations.

OCR image: A black-and-white image derived from the primary image, optimized for good OCR results.

Some tools affect the Primary image, others the OCR image. Be sure you know which image you are editing.

Good brightness and contrast settings play an important role in OCR accuracy. Set these in the Scanner panel of the Options dialog box or in your scanner's interface. The diagram illustrates an optimum brightness setting. After loading an image, check its

appearance. If characters are thick and touching, lighten the brightness. If characters are thin and broken, darken it. Use the OCR Brightness tool to optimize the image.

Image Enhancement Tools

The Image Enhancement tools can also be used to edit images to save and use them as image files. Note that some these tools work on the Primary image, others on the one used for OCR (OCR image). Click the Primary/OCR Image button in the Image Enhancement window, to see the current state of either image.

The Image Enhancement window has two panels. The left panel shows the starting image. Your changes are shown in the right preview panel. When you click Accept, the right image is moved to the left panel to become the new starting image for further enhancement.

The following tools are accessible on the toolbar; their usage is detailed as follows:

P - affects Primary image only.

O - affects OCR image only.

PO - can be applied to either the Primary or OCR image (or both)

P+O - a single action is applied to both the Primary and OCR image.

P/O - affects both images.

WH - applies to whole images only.

AR - can be applied to selected image areas.

Pointer (F5) - the Pointer is a neutral tool carrying out different operations under different circumstances (for example, to pick a color for the Fill operation, or to catch the deskew line.) PO.

Zoom (F6) - click the tool then use the left mouse button to zoom in on your image or the right mouse button to zoom out. You can also use the mouse wheel for zooming in and out - even in the inactive view. In the active view the "+" and "-" buttons serve the same purpose. P+O. WH.

Select Area (F7) - click this, then on a tool that can work on a page area (marked AR) and draw your selection on the image. Image enhancement tools by default work on the whole page. Selection has three modes (in the View menu): Normal, Additive, and Subtractive. PO. AR.

Primary/OCR Image - click this tool to switch between the primary and the OCR image in the active view. Primary images can be of any image mode, while an OCR image is its black-and-white version, generated purely for OCR purposes. P/O. WH.

Synchronize Views - click this tool to zoom and scroll the inactive view to the same zoom value and scroll position as the active view. To make the inactive view dynamically follow the focus of the active one, click View then choose the Keep Synchronized command. PO. WH.

The following SET tools allow you to modify image contents:

Brightness and Contrast - click this tool to adjust the brightness and contrast of your primary image or a selected part of it. Use the sliders in the tool area to achieve the desired effect. P. AR.

Hue / Saturation / Lightness - click this tool then use the sliders to modify the hue, saturation and lightness of your primary image. P. AR.

Crop - to use only a part of your image, click the Select Area tool, then the Crop tool and select the area to keep – the rest of the image will be removed. P+O. WH › AR

Rotate - click this tool to rotate (by 90, 180 or 270 degrees) and/or flip your image. P+O. WH.

Despeckle - click this tool to remove stray dots from your image. Despeckle works on the OCR image at 4 levels of severity. You can also use this tool not to remove noise from the page but to strengthen letter outlines: to do this mark the checkbox Inverse despeckling. O. AR.

OCR Brightness - use this tool the set Brightness and Contrast of your OCR image. See the diagram of optimum brightness under Preprocessing Images above. O. AR.

Dropout color - click this tool and select Red, Green, Blue or choose a color from the primary image with the Select Area tool. Sections of the scanned image in this color will be set transparent. The tool has its effect on the OCR image. P/O. WH.

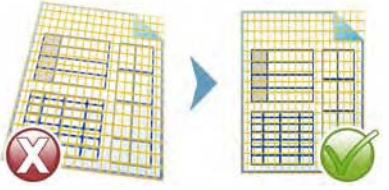
Resolution - use this tool to decrease the resolution of your primary image in percentages. Note that you cannot adjust a resolution higher than that of the original one. P. WH.

Deskew - sometimes pages are scanned crookedly. To straighten the lines of text manually, use the Deskew tool. (Auto-deskew is also available in the Process panel of Options.) P+O. WH.

3D Deskew - use this tool to remove perspective distortion from digital camera images. This is particularly useful when you want to check the results of automatic 3D Deskew or you prefer to do 3D deskew manually after a Load Files step. P+O. WH.

Fill - use this tool to apply a color to the image or a selected part of it. PO. AR.

3D Deskew works by snapping the distorted image to a grid. All you need to do is to manually straighten this grid, and image coordinates will follow - see illustration below (before - after 3D Deskew).



Using Image Enhancement History

To commit or undo your image edits (one by one or all the steps), use the History panel in the Image Enhancement window. Once you have modified the original image, its preview displays the changes,

but they are not done until you click the Apply button next to the History list. Modifications not added to the History by clicking the Add button will not be applied.

Any time you want to see what output a certain step resulted in, double click it in the History list.

To discard changes you have performed with a given tool, but before applying it, select the step in the list, then click the Reset button.

To restore the image as it was before you started the current enhancement session, click the Discard all changes button.

Saving and applying templates

If you have a number of similar images to enhance, you can build up a list of enhancement steps to apply to all of them.

To create and store an image enhancement template, first bring an image file into the Image Enhancement window, then carry out your preprocessing steps and add them to the History clicking the Apply button. When you are done, choose Save Enhancement Template from the File menu. Browse to your preferred destination and save the template file (with the extension .ipp).

To carry out the set of modifications saved in the template file on another image, simply open the new image in the Image Enhancement window and choose Load Enhancement Template from the File menu.

Image Enhancement in Workflows

To incorporate image enhancement in a workflow choose its icon in the Workflow Assistant. The following options are available:

Display images for manual enhancement - during the execution of a workflow, each loaded image will be displayed for manual editing.

Apply enhancement template - an already saved enhancement template will be applied automatically to the image while being processed by the workflow.

Apply enhancement template and display - the workflow will apply the selected image enhancement template, and will also display the image so that you can make further edits to it.

Zones and backgrounds

Zones define areas on the page to be processed or ignored. Zones are rectangular or irregular, with vertical and horizontal sides. Page images in a document have a background value: process or ignore (the latter is more typical). Background values can be changed with the tools shown. Zones can be drawn on page backgrounds with the tools shown under Zone Types and Properties (see later).

Process areas (in process zones or backgrounds) are auto-zoned when they are sent to recognition.

Ignore areas (in ignore zones or backgrounds) are dropped from processing. No text is recognized and no image is transferred.

Automatic zoning

Automatic zoning allows the program to detect blocks of text, headings, pictures and other elements on a page and draw zones to enclose them.

You can Auto-zone a whole page or a part of it. Automatically drawn zones and template zones have solid borders. Manually drawn or modified zones have dotted borders.

Auto-zone a page background

Acquire a page. It appears with a process background. Draw a zone. The background changes to ignore. Draw text, table or graphic zones to enclose areas you want manually zoned. Click the

Process background tool (shown) to set a process background. Draw ignore zones over parts of the page you do not need. After recognition the page will return with an ignore background and new zones round all elements found on the background.

Auto-zoning vertical text

If you set Japanese, Korean or Chinese as the recognition language, auto-zoning will find text blocks and detect the text direction. Vertical Asian text appears horizontally in the Text Editor, but can be exported as vertical - see Chapter 4, page 61.

Auto-zoning detects vertical texts in non-Asian languages in table cells and anywhere on Normal PDF or XPS pages. Multi-line detection is possible in these cases.

For image-only PDF and XPS files, and for all other image file or scanner input, auto-detection works with the following conditions:

- It must be only a single line of text
- It must be on the left or right of a diagram or picture or
- It must be situated on the left or right edge of the page - it does not have to extend over the full height of the page.

Vertical text outside tables can be manually zoned, as described below. This allows multiple vertical lines to be handled correctly.

Vertical texts can be viewed and edited with a vertical cursor in the Text Editor using True Page. In other formatting levels the text is placed horizontally.

Zone types and properties

Each zone has a zone type. Zones containing text can also have a zone contents setting: alphanumeric or numeric. The zone type and zone contents together constitute the zone properties. Right-click in a zone for a shortcut menu allowing you to change the zone's

properties. Select multiple zones with Shift+clicks to change their properties in one move.

The Image toolbar provides zone drawing tools, one for each type.

Process zone

Use this to draw a process zone, to define a page area where auto-zoning will run. After recognition, this zone will be replaced by one or more zones with automatically determined zone types.

Ignore zone

Use this to draw an ignore zone, to define a page area you do not want transferred to the Text Editor.

Text zone

Use this to draw a text zone. Draw it over a single block of text. Zone contents will be treated as flowing text, without columns being found. Use it for texts using the Latin, Greek or Cyrillic alphabets and for horizontal texts in the Asian languages.

Vertical Asian text zone

Use this to draw text zones for vertical text in Japanese or Chinese. Zones should be rectangular.

Vertical left-rotated text zone

Use this to draw text zones for vertical text that is left rotated (non-Asian languages only). The zones should be rectangular.

Vertical right-rotated text zone

Use this to draw a text zone for vertical text that is right rotated (non-Asian languages only). The zones should be rectangular.

Table zone

Use this to have the zone contents treated as a table. Table grids can be automatically detected, or placed manually. Table zones should be rectangular. Vertical texts in tables cannot be zoned manually – they can be auto-detected in gridded tables.

Graphic zone

Use this to enclose a picture, diagram, drawing, signature or anything you want transferred to the Text Editor as an embedded image, and not as recognized text.

Form zone

Use this to enclose an area of your document containing form elements such as a checkbox, radio button, text field or anything you want transferred to the Text Editor as a form element. Afterwards, in True Page, you can edit form layout, and modify the properties of form elements. Form zones are available in OmniPage Professional 17 only.

Working with zones

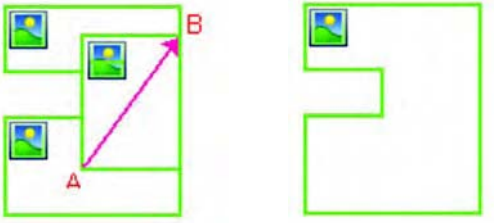
The Image toolbar provides zone editing tools. Grouped tools can be undocked/floated an re-docked as a separate mini toolbar for convenience. One is always selected. When you no longer want the service of a tool, click a different tool. Some tools on this toolbar are grouped. If docked as a single tool, only the last selected tool from the group is visible. To select a visible tool, click it.

To draw a single zone select the zone drawing tool of the desired type, then click and drag the cursor.

To resize a zone, select it by clicking in it, move the cursor to a side or corner, catch a handle and move it to the desired location. It cannot overlap another zone.

To make an irregular zone by addition draw a partially overlapping zone of the same type.

To join two zones of the same type draw an overlapping zone of the same type (drawn zones on the left, resulting zone on the right).



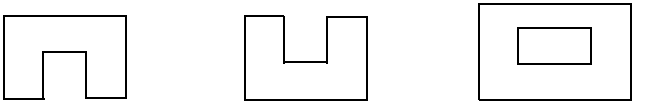
To make an irregular zone by subtraction draw an overlapping zone of the same type as the background.

To split a zone draw a splitting zone of the same type as the background.

A full set of zoning diagrams appear in Help.

When you draw a new zone that partly overlaps an existing zone of a different type, it does not really overlap it; the new zone replaces the overlapped part of the existing zone.

The following zone types are prohibited:



Speed zoning lets you do manual zoning quickly. Activate the zone selection cursor, then move the cursor over the page image. Shaded areas will appear showing the auto-detected zones. Double-click to transform a shaded area into a zone.

Table grids in the image

After automatic processing you may see table zones placed on a page. They are denoted with a table zone icon in the top left corner of the zone. To change a rectangular zone to or from a table zone, use its shortcut menu. You can also draw table type zones, but they must remain rectangular.

You draw or move table dividers to determine where gridlines will appear when the table is placed in the Text Editor. You can draw or resize a table zone (provided it stays rectangular) to discard unneeded columns or rows from the outer edges of a table.

Using the table tools you can insert row and column dividers; move and remove dividers. Click the Place/Remove all dividers tool to have dividers in a table auto-detected and placed.

You can specify line formatting for table borders and grids from a shortcut menu. You will have greater choice for editing borders and shading in the Text Editor after recognition.

Using zone templates

A template contains a page background value and a set of zones and their properties, stored in a file. A zone template file can be loaded to have template zones used during recognition. Load a template file in the Layout Description drop-down list or from the Tools menu. You can browse to network locations to load templates created by others.

When you load a template, its background and zones are placed:

- on the current page, replacing any zones already there
- on all further acquired pages
- on pre-existing pages sent to (re-)recognition without any zones.

With manual processing the template zones in the first two cases can be viewed and modified before recognition.

With automatic processing the template zones can be viewed and modified only after recognition.

With workflow processing, use the zone images step. This combines two steps: load templates and manual zoning. To use a zone template, click the Add button in the appropriate panel of the Workflow Assistant, and select the zone template file to use. Then make your choice between displaying images for manual zoning; applying the zone template; or applying it and display the images.

Templates accept ignore and process zones and backgrounds. They can therefore be useful to define which parts of the pages to process with auto-zoning, and which parts to ignore. Process zones or process background areas from a template may be replaced during recognition by a set of smaller zones; specific zone types will be assigned to these zones.

How to save a zone template

Select a background value and prepare zones on a page. Check their locations and properties. Click Zone Template... in the Tools menu. In the dialog box, select [zones on page] and click Save, then assign a name and optionally a different path. Choose a network location to share the template file. Click OK. The new zone template remains loaded.

How to modify a zone template

Load the template and acquire a suitable image with manual processing. The template zones appear. Modify the zones and/or properties as desired. Open the Zone Template Files dialog box. The current template is selected. Click Save and then Close.

How to unload a template

Select a non-template setting in the Layout Description drop-down list. The template zones are not removed from the current or existing pages, but template zones will no longer be used for future processing. You can also open the Zone Template Files dialog box, select [none] and click the Set As Current button. In this case, the layout description setting returns to Automatic.

How to replace one template with another

Select a different template in the Layout Description drop-down list, or open the Zone Template Files dialog box, select the desired template and click the Set As Current button. Zones from the new template are applied to the current page, replacing any existing zones. They are also applied as explained above.

How to remove a template file

Open the Zone Template Files dialog box. Select a template and click the Remove button. Zones already placed by this template are not removed. Template files can be deleted only from the operating system.

How to include a template file in an OPD

Open a document, then click Tools and choose Zone Template. Select the one you want to include and click Embed. Then save the document to the OPD format. This means the template will travel with the OPD if it is sent to a new location. When the OPD file is opened later, the included zone template will be shown in the Zone Template Files dialog box as [embedded] and can be saved to a new named template file at the new location by using the Extract button.

Proofing and editing

Recognition results are placed in the Text Editor. These can be recognized texts, tables, forms and embedded graphics. This WYSIWYG (What You See Is What You Get) editor is detailed in this chapter. Asian text handling is in some respects different from other languages. See "Asian language recognition" on page 61.

The editor display and formatting levels

The Text Editor displays recognized texts and can mark words that were suspected during recognition with red, wavy underlines. They are displayed with red characters in the OCR Proofreader.

A word may be suspect because it was not found in any active dictionary: standard, user or professional. It may also be suspect as a result of the OCR process, even if it is found in the dictionary. If the uncertainty stems from certain characters in the word, these are shown with a yellow highlight, both in the Editor and the OCR Proofreader.

Choose to have non-dictionary words marked or not in the Proofing panel of the Options dialog box. All markers can be shown or hidden as selected in the Text Editor panel of the Options dialog box. You can also show or hide non-printing characters and header/footer indicators. The Text Editor panel also lets you define a unit of measurement for the program and a word wrap setting for use in all Text Editor formatting levels except Plain Text.

OmniPage 17 can display pages with three levels of formatting. You can switch freely between them with the three buttons at the bottom left of the Text Editor or from the View menu.

Plain Text
This displays plain decolumnized left-aligned text in a single font and font size, with the same line breaks as in the original document.

Formatted Text
This displays decolumnized text with font and paragraph styling.

True Page
True Page® tries to conserve as much of the formatting of the original document as possible. Character and paragraph styling is retained. Reading order can be displayed by arrows.

Proofreading OCR results

After a page is recognized, the recognition results appear in the Text Editor. Proofreading starts automatically if that was requested in the Proofing panel of the Options dialog box. You can start proofing manually any time. Work as follows:

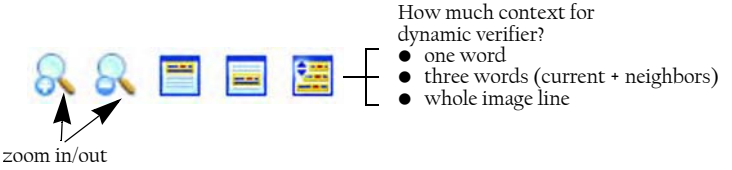
1. Click the Proofread OCR tool in the Standard toolbar, or choose Proofread OCR... in the Tools menu.
2. Proofing starts from the current page, but skips text already proofed. If a suspected error is detected, the OCR Proofreader dialog box colors the suspect word in its context, adds a yellow highlight to any suspect characters and provides a picture of how the word originally looked in the image. The explanation says 'Suspect word' or 'Non-dictionary word'.
3. If the recognized word is correct, click Ignore or Ignore All to move to the next suspect word. Click Add to add it to the current user dictionary and move to the next suspect word.

4. If the recognized word is not correct, modify the word in the Edit panel or select a dictionary suggestion. Click Change or Change All to implement the change and move to the next suspect word. Click Add to add the changed word to the current user dictionary and move to the next suspect word.
5. Color markers are removed from words in the Text Editor as they are proofread. You can switch to the Text Editor during proofing to make corrections there. Use the Resume button to restart proofing. Click Page Ready to skip to the next page and Document Ready or Close to stop proofreading before the end of the document is reached.
6. A page is marked with the proofed icon on its thumbnail and in the Document Manager if proofing ran to the end of the page. Choose Recheck Current Page... from the Tools menu to re-proof a page.

Verifying text

After performing OCR, you can compare any part of the recognized text against the corresponding part of the original image, to verify that the text was recognized correctly.

The verifier tool is in the Formatting toolbar. The verifier can also be controlled from the Tools menu. Hover the cursor over a verifier display to obtain the verifier toolbar. Use it as follows:



To turn the Verifier on, click the Verifier tool or press F9. To turn it off, click the Verifier tool again, press F9 again, or press Esc.

A full list of verifier keyboard shortcuts is available in Help.

The Character Map

The Character Map is a dockable tool giving you aid in proofing. It is used for essentially two purposes:

- to insert characters during proofing and editing that are not or not easily accessible from your keyboard. In this respect, it is very similar to the system Character Map.
- to show all characters validated by the current recognition languages.

To access the Character Map, click its button in the Formatting Toolbar, or choose Character Map from the View menu and click Show.

Under the Character Map menu item, you can also choose to display recent characters only, or different character sets (by default only two are displayed). Asian characters are not supported.

You can access the Character Map in other ways, such as:

- Click Tools › Options and choose the OCR tab. Click the Additional Characters button to select characters to be included in proofing. Similarly, you can modify the Reject Character by using the Character Map.
- Select Train Character under the Tools menu. Click the (...) button beside the Correct field.
- Select Train Character from the shortcut menu of a suspect or non-dictionary word in the Text Editor.

User dictionaries

The program has built-in dictionaries for many languages. These assist during recognition and may offer suggestions during proofing. They can be supplemented by user dictionaries. You can save any number of user dictionaries, but only one can be loaded at a time. A dictionary called Custom is the default user dictionary for Microsoft Word.

Starting a user dictionary
Click Add in the OCR Proofreader dialog box with no user dictionary loaded or open the User Dictionary Files dialog box from the Tools menu and click New.

Loading or unloading a user dictionary
Do this from the OCR panel of the Options dialog box or from the User Dictionary Files dialog box.

Editing or removing a user dictionary
Add words by loading a user dictionary and then clicking Add in the OCR Proofreader dialog box. You can add and delete words by clicking Edit in the User Dictionary Files dialog box. You can also import words from OmniPage user dictionaries (*.ud). While editing a user dictionary, you can import a word list from a plain text file to add words to the dictionary quickly. Each word must be on a separate line with no punctuation at the start or end of the word. The Remove button lets you remove the selected user dictionary from the list.

To embed a user dictionary in an OmniPage Document, load your input file, choose Tools › User Dictionary; select the user dictionary you want to use, click Embed, and name it. Then save to the file type OmniPage Document.

Languages

The program can read over 120 languages with multiple alphabets: Latin, Greek, Cyrillic, Chinese, Japanese and Korean. See the full language list in the OCR panel of the Options dialog box. It shows which languages have dictionary support. A listing is also provided on the Nuance web site.

In addition to user dictionaries, specialized dictionaries are available for certain professions (currently medical, legal and financial) for some languages. See the list and make selections in the OCR panel of the Options dialog box.

Asian language recognition

Four languages with Asian alphabets are supported: Japanese, Korean, Traditional Chinese and Simplified Chinese. The ideal font size for body text is 12 points, scanned at 300 dpi, resulting in characters with around 48 x 48 pixels. Minimum is 30 x 30, that is 10.5 points at 300 dpi. For smaller characters, 400 dpi should be used. Asian texts can be horizontal (left-to-right) or vertical (top-to-bottom, right-to-left). Operating systems supported by OmniPage 17 can handle Asian languages, but if East Asian language support was not selected during system install, it must be added from Control Panel / Regional and Language Settings / Languages / Supplemental language support / Install files for East Asian languages. You may be required to insert a Windows system disk.

The four Asian languages are listed alphabetically with the others in the Options/OCR panel. You should select only one of these languages at a time and avoid a multiple selection with other languages. Asian OCR can handle short embedded English texts without English being explicitly set; this is not designed for longer English texts or for texts in other Western languages. Vertical text is typical in Japanese and Chinese - English may be embedded there

in different orientations. The program can handle these; in the output they appear right-rotated.

Beside the language list the option *Verify language choices* invokes automatic language detection that warns of differences between a detected language and the language setting. It works at page-level and identifies four categories: Japanese, Chinese, Korean and non-Asian. It cannot distinguish between Traditional and Simplified Chinese or between non-Asian languages. The last category means Japanese, Chinese or Korean characters were not detected. Verification takes place during image pre-processing, so the required recognition language must be set before image loading.

Auto-layout and auto-zoning are recommended for Asian pages. This places all detected texts into text zones; by choosing an Asian recognition language you set Asian OCR to run in these zones and that can automatically detect and transmit the text direction, coping with mixed areas of horizontal and vertical texts on a page.

However, the zoning tool lets you force vertical Asian recognition by manual zoning. Please draw rectangular zones with this tool. To manually zone horizontal Asian text, use the usual text zone type. Do not use the two other vertical-text tools on Asian texts. Drawing a vertical Asian zone does not automatically enable an Asian language, nor influence the language auto-detection.

Digital camera images are accepted for Asian languages. However, the automatic 3D deskew algorithm is unlikely to be useful - certainly not for vertical texts. Preferably use the standard image loading command and perform manual 3D deskewing with the relevant SET tool if required. In general, SET tools can be used on Asian images.

Recognized Asian pages appear in the Text Editor, provided your system has support for East Asian languages - always with horizontal text direction. There is no need to specify Asian fonts

under Options/OCR, a default font is automatically applied - typically Arial Unicode MS. Other Asian-capable fonts on your system can be chosen in the Text Editor. Editor support allows text viewing and verifying - Formatted Text is recommended as formatting level. Large-scale editing and spell-checking are better done in the target application. Proofing, training and dictionary support are not available for Asian texts. Therefore, prior to performing Asian OCR, go to the Proofing panel under Options and disable dictionary word marking, automatic proofreading and IntelliTrain and ensure that no training file is loaded. Redaction can be applied to Asian texts, either by selection or searching. The workflow step Form Data Extraction should not be applied to Asian pages.

Typical output converters for Asian texts are RTF, Microsoft Word, Searchable PDF or XPS. The text direction will be as detected during pre-processing. Changes made in the Text Editor - where text is horizontal - will be exported, also to vertical text. Plain Text converters are available (Unicode TXT, Notepad) but here text direction will always be horizontal.

Training

Training is the process of changing the OCR solutions assigned to character shapes in the image. It is useful for uniformly degraded documents or when an unusual typeface is used throughout a document. OmniPage 17 offers two types of training: manual training and automatic training (IntelliTrain). Data coming from both types of training are combined and available for saving to a training file.

When you leave a page on which training data was generated, you will be asked how to apply it to other existing pages in the document.

Manual training

To do manual training, place the insertion point in front of the character you want to train, or select a group of characters (up to one word) and choose Train Character... from the Tools menu or the shortcut menu. You will see an enlarged view of the character(s) to be trained, along with the current OCR solution. Change this to the desired solution and click OK. The program takes this training and examines the rest of the page. If it finds candidate words to change, the Check Training dialog box lists these. Incorrect words should be re-trained before the list is approved.

IntelliTrain

IntelliTrain is an automated form of training. It takes input from the corrections you make during proofing. When you make a change, it remembers the character shape involved, and your proofing change. It searches other similar character shapes in the document, especially in suspect words. It assesses whether to apply the user correction or not.

You can turn IntelliTrain on or off in the Proofing panel of the Options dialog box. IntelliTrain remembers the training data it collects, and adds it to any manual training you have done. This training can be saved to a training file for future use with similar documents.

For examples of IntelliTrain, see Help.

Training files

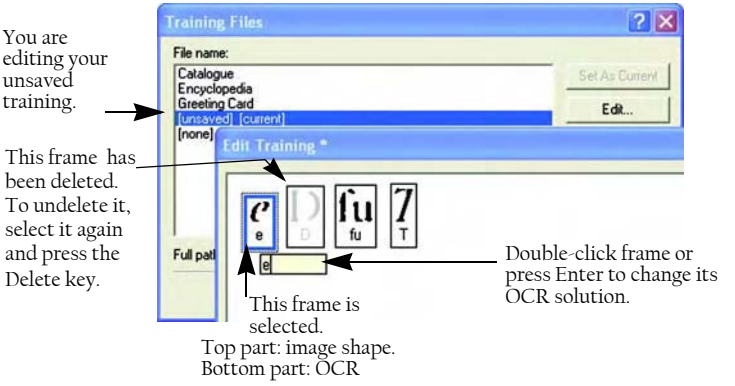
Whenever you close a document or switch to another one when unsaved training data exists, a dialog box appears allowing you to save it. To save a training file into an OPD, load it from Tools › Training File, click Embed, and save to the file type OmniPage Document.

Saving training to file, loading, editing and unloading training files are all done in the Training Files dialog box.

Unsaved training can be edited in the Edit Training dialog box, an asterisk is displayed in the title bar in place of a training file name. Save it in the Training Files dialog box.

A training file can be also edited; its name appears in the title bar. If it has unsaved training added to it, an asterisk appears after its name. Both the unsaved and the modified training are saved when you close the dialog box.

The Edit Training dialog box displays frames containing a character shape and an OCR solution assigned to that shape. Click a frame to select it. Then you can delete it with the Delete key, or change the assignation. Use arrow keys to move to the next or previous frame.



Text and image editing

OmniPage has a WYSIWYG Text Editor, providing many editing facilities. These work very similarly to those in leading word processors.

Editing character attributes
In all formatting levels except Plain Text, you can change the font type, size and attributes (bold, italic, underlined) for selected text.

Editing paragraph attributes
In all formatting levels except Plain Text, you can change the alignment of selected paragraphs and apply bulleting to paragraphs.

Paragraph styles
Paragraph styles are auto-detected during recognition. A list of styles is built up and presented in a selection box on the left of the Formatting toolbar. Use this to assign a style to selected paragraphs.

Graphics
You can edit the contents of a selected graphic if you have an image editor in your computer. Click Edit Picture With in the Format menu. Here you can choose to use the image editor associated with BMP files in your Windows system, and load the graphic. Alternatively, you can use the Choose Program... item to select another program. This will replace the Default Image Editor item. Edit the graphic, then close the editor to have it re-embedded in the Text Editor. Do not change the graphic's size, resolution or type, because this will prevent the re-embedding. You can also edit images before recognition using the Image Enhancement tools.

Tables
Tables are displayed in the Text Editor in grids. Move the cursor into a table area. It changes appearance, allowing you to move gridlines. You can also use the Text Editor's rulers to modify a table. Modify the

placement of text in table cells with the alignment buttons in the Formatting toolbar and the tab controls in the ruler.

Hyperlinks
Web page and e-mail addresses can be detected and placed as links in recognized text. Choose Hyperlink... in the Format menu to edit an existing link or create a new one.

Editing in True Page
Page elements are contained in text boxes, table boxes and picture boxes. These usually correspond to text, table and graphic zones in the image. Click inside an element to see the box border; they have the same coloring as the corresponding zones. The Help topic *True Page* provides details on the operations summarized here.

Frames have gray borders and enclose one or more boxes. They are placed when a visible border is detected in an image. Format frame and table borders and shading with a shortcut menu or by choosing Table... in the Format menu. Text box shading can be specified from its shortcut menu.

Multicolumn areas have orange borders and enclose one or more boxes. They are auto-detected and show which text will be treated as flowing columns when exported with the Flowing Page formatting level.

Reading order can be displayed and changed. Click the Show reading order tool in the Formatting toolbar to have the order shown by arrows. Click again to remove the arrows.

Click the Change reading order tool for a set of reordering buttons in place of the Formatting toolbar. A changed order is applied in the formatting levels Plain Text and Formatted Text. It modifies the way the cursor moves through a page when it is exported as True Page.

On-the-fly editing

This allows you to modify a recognized page through re-zoning, without having to re-process the whole page. When on-the-fly editing is enabled, zone changes (deleting, drawing, resizing, changing type) immediately make changes in the recognized page. Conversely, when you modify elements in the Text Editor's True Page formatting level, this changes the zones on that page.

Two linked tools on the Image toolbar control on-the-fly zoning. One of these tools is always active whenever no recognition is in progress.

Click this to activate on-the-fly editing. The red signal shows there are no stored zoning changes.

Click this to turn on-the-fly editing off. Your zoning changes are stored; the on-the-fly tool displays a green signal to show there are stored changes. To activate these changes, do one of the following:

Click the on-the-fly tool with a green signal. The zoning changes will cause changes in the Text Editor.

Click the Perform OCR button to have the whole page (re)recognized, including your zone changes.

For details on how changes are handled in on-the-fly zoning and their effects in the Text Editor, see *On-the-fly processing* in Help.

Marking and redacting

The Mark Text toolbar gives you tools to mark (highlight or strike-out); and to redact text. Use the View menu to have this toolbar displayed. You can float or dock this tool group. Each tool has its equivalent menu item in the Format menu or the Text Editor shortcut menu.

Redacting is blacking out confidential information. It is unreadable and unsearchable. To mark and redact text manually, click the Mark for Redacting tool and use its cursor to select all the text parts you want to redact. They appear with a gray highlight. When you are ready, click the Redact Document tool. Choose to do redaction in a copy (safer) or the original document. If you choose to redact a copy, both the copy and the original remain open in OmniPage, ready to be saved.

WARNING: If you redact the original document, you cannot retrieve the information you have blacked out.

To find and redact text by searching, select Find and Mark Text from the Edit menu to display the Find, Replace and Mark Text dialog box. Search for text to be marked for redaction. Step through all occurrences and decide for each case whether to redact immediately or mark for redaction. In the latter case, perform the redaction by choosing Close and Redact Document in the Mark Text dialog box or later click the Redact Document button.

You can apply highlighting and striking out either by selection or searching.

Reading text aloud

The Nuance RealSpeak® speech facility is provided for the visually impaired, but it can also be useful to anyone during text checking and verification. The speaking is controlled by movements of the insertion point in the Text Editor which can be mouse or keyboard driven.

To hear text:	Use these keys:
One character at a time, forward or back	Right or left arrow. Letter, number or punctuation names are spoken.
Current word	Ctrl + Numpad 1
One word to the right	Ctrl + right arrow
One word to the left	Ctrl + left arrow
A single line	Place the insertion point in the line
Next line	Down arrow
Previous line	Up arrow
Current sentence	Ctrl + Numpad 2
From insertion point to end of sentence	Ctrl + Numpad 6
From start of sentence to insertion point	Ctrl + Numpad 4
Current page	Ctrl + Numpad 3
From top of current page to insertion point	Ctrl + Home
From insertion point to end of current page	Ctrl + End

Previous, next or any page	Ctrl + PgUp, PgDown or navigation buttons
Typed characters	Each typed character is pronounced separately.

The Text-to-Speech facility is enabled or disabled with the Tools menu item Speech Mode or with the F10 key. A second menu item Speech Settings... allows you to select a voice (for example, male or female for a given language), a reading speed and the volume. You must ensure the language selection is appropriate for the text you want to hear.

You also have the following keyboard controls:

To do this:	Use this:
Pause/Resume	Ctrl + Numpad 5
Set speed higher	Ctrl + Numpad +
Set speed lower	Ctrl + Numpad –
Restore speed	Ctrl + Numpad *

All speech systems will be installed with OmniPage 17 if you choose a complete installation. If you perform a custom installation, you can choose the languages you need.

Creating and editing forms

You can bring paper or static electronic forms (distributed mainly as PDF in an office environment) into OmniPage Professional 17, recognize them and edit their content, layout or both - in True Page. Draw form zones over the relevant areas of your image before recognition, or choose Form as recognition layout, then use the two toolbars: Form Drawing and

Form Arrangement to make modifications and produce a fillable form and save it in the following formats: PDF, RTF, or XSN (Microsoft Office InfoPath 2003 format). Static forms can be saved to HTML. OmniPage Professional 17 uses the Logical Form Recognition™ technology to create fillable forms from static ones.

Please note that OmniPage supports form creation and editing, however the tools available here are not designed to fill in forms.

The Form Drawing Toolbar

This is a dockable toolbar, displayed in the Text Editor that allows you to create a range of form elements using the following tools:

Selection: Click this tool to be able to select, move, or resize elements in your form.

Text: Use the text tool to add fixed text descriptions on your form such as titles, labels and headers.

Line: The Line tool is mainly used in layout design: click it and draw lines to separate distinct sections in your form.

Rectangle: Click this tool to create rectangles in your form for design purposes.

Graphic: Use this tool to select areas of your form that are to be treated as graphics.

Fill text: Click this tool to create fillable text fields. These are fields where you want people to enter text.

Comb: Use this tool to create a text field consisting of boxes. This is typically used for information such as ZIP codes.

Checkbox: Click this tool and draw Checkboxes - typically for Yes/No questions and marking one or more choices.

Circle text: Its function is similar to the Checkbox element (above): the Circle text tool creates elements that get encircled when selected.

Table: This tool creates tables in your form.

You can also create form elements by right-clicking an existing form element in your recognized form, and choose the Insert Form Object menu item.

The Form Arrangement Toolbar

The tools on this toolbar can be used to line up form elements or to set which one is on top of the others when they overlap. This latter function is useful for example if you want to create a background graphic design for your form.

To set the order of overlapping elements, use the **"Bring to Front"** and **"Send to Back"** buttons.

To align the right/left, top/bottom edges or the centers of the selected form elements

horizontally - use the horizontal alignment tools

vertically - use the vertical arrangement tools.

The commands of the Form Arrangement toolbar are also accessible from the shortcut menu of any form element.

Editing Form object properties

To edit a form object directly select it then right-click the given element to display its shortcut menu. You can edit the appearance or the properties of any form element here. Use the following commands:

Form Object Appearance - use the tabs Borders, Shading and Shadow to design the look of your form elements in a similar way as you would do in a text-editing application.

Form Object Properties - this command gives you access to the element properties such as size, position, name. Properties dynamically vary depending on what type of element you select.

Extracting Form Data

Form data extraction (FDE) is a workflow step. Data is extracted from elements such as fillable fields, check boxes, and option buttons. FDE is a simplified implementation of the full Logical Form Recognition technology.

To create a workflow that contains form data extraction:

- Define the processing input and its settings. Input types include: image PDF, PDF form, image files and forms scanned from paper.
- Choose Extract Form Data in place of recognition, and specify its settings. Set an active PDF form as template. It can be single or multi-page, filled or unfilled. The program determines the location and type of the form fields based on this form template.
- Finish the workflow with a saving step.

OmniPage will extract data from incoming forms, using the specified template. Export is to a comma-separated value text file (.csv) ready to be loaded into a spreadsheet.

Once you select Form Data Extraction in a workflow, only saving steps will follow.

Saving and exporting

Once you have acquired at least one image for a document, you can export the image to file. Once you have recognized at least one page, you can export recognition results. After further recognition you can save a single page, selected pages or the whole document by saving to file, copying to Clipboard or sending to a mailing application. Saving as an OmniPage Document is always possible. OmniPage provides comprehensive support for Office 2007 applications and formats, so long as you have Microsoft .NET Framework 3.0 installed.

A document remains in OmniPage after export. This allows you to save, copy or send its pages repeatedly, for example with different formatting levels, using different file types, names or locations. You can also add or re-recognize pages or modify the recognized text.

With automatic processing and in Batch Manager jobs, you specify where to save first before processing starts.

A workflow may contain one or more saving steps, even to different targets (for instance, to file and to mail). A Batch Manager job must contain at least one saving step. See Chapter 6, page 91, "Workflows".

Saving and Exporting

If you want to work with your document again in OmniPage in a later session, save it as an OmniPage Document. This is a special output file type. It saves the original images together with the recognition results, settings and training.

Exporting is done through button 3 on the OmniPage Toolbox. It lists available export targets. Some appear only if access to the

target is detected on your computer. Select the desired target then click the Export Results button to begin export. You can also perform exporting through the Process menu.

Saving original images

You can save original images to disk in a wide variety of file types with or without image enhancement (using the Image Enhancement Tools).

1. Choose Save to File in the Export Results drop-down list. In the dialog box that appears, select Image under Save as.

2. Choose a folder location and a file type. Type in a file name.
3. Select to save the selected zone image(s) only, the current page image, selected page images or all images in the document. For multiple zones or multiple pages, you can have all images in a single multi-page image file, providing you set TIFF, MAX, DCX, JB2 or Image-only PDF or XPS as file type. Otherwise each image is placed in a separate file. OmniPage adds numerical suffixes to the file name you provide, to generate unique file names.
4. Click Options... if you want to specify a saving mode (black-and-white, grayscale, color or 'As is'), a maximum resolution and other settings. For TIFF files, you specify the compression method here.
5. Click OK to save the image(s) as specified. Zones and recognized text are not saved with the file.

Saving recognition results

You can save recognized pages to disk in a wide variety of file types.

1. Choose Export Results... in the File menu, or click the Export Results button in the OmniPage Toolbox with Save to File selected in the drop-down list.
2. The Save to File dialog box appears. Select Text under Save as.
3. Select a folder location and a file type for your document. Select a page range, file options, naming options and a formatting level for the document. See "Selecting a formatting level" on this page.
4. Type in a file name. Click Options... if you want to specify precise settings for the export. See "Selecting converter options" later in this chapter.
5. Click OK. The document is saved to disk as specified. If *View Result* is selected, the exported file will appear in its target application; that is the one associated with the selected file type in your Windows system or in the advanced saving options for your selected file type converter.

Selecting a formatting level

The formatting level for export is defined at export time, in the saving dialog box (Save to File, Copy to Clipboard, Send in Mail or other dialog box). Three of the levels correspond to the format views of the same name in the Text Editor. However, the level to be applied for saving is independent of the formatting view displayed in the Text Editor. When exporting to file or mail, first specify a file type. This determines which formatting levels are available.

The formatting levels are:

Plain Text
This exports plain decolumnized left-aligned text in a single font and font size. When exporting to Text or Unicode file types, graphics and tables are not supported. You can export plain text to nearly all file types and target applications; in these cases graphics, tables and bullets can be retained.

Formatted Text
This exports decolumnized text with font and paragraph styling, along with graphics and tables. This is available for nearly all file types.

Flowing Page
This keeps the original layout of the pages, including columns. This is done wherever possible with column and indent settings, not with text boxes or frames. Text will then flow from one column to the other, which does not happen when text boxes are used.

True Page
This keeps the original layout of the pages, including columns. This is done with text, picture and table boxes and frames. This is offered only for target applications capable of handling these. True Page formatting is the only choice for XML export and for all PDF export, except to the file type 'PDF Edited'.

Spreadsheet
This exports recognition results in tabular form, suitable for use in spreadsheet applications. This places each document page onto a separate worksheet.

When exporting to Microsoft Excel, 'Spreadsheet' is good for saving whole-page tables. Prefer 'Formatted Text' if your document contains smaller tables: each table will be placed on a separate worksheet with non-table parts placed in an index worksheet with hyperlinks to each relevant worksheet

Selecting converter options

Click the Options... button in a saving dialog box to have precise control over the export. This brings up a dialog box with the name of the converter associated with the current file type. It presents a series of options tailored to this file type. First, confirm or change the formatting level, because this influences which other options are presented. Select options as desired. Help details how to do this.

To make changes apply to all future export done with the given converter, select the checkmark *Make changes permanent*. If this is not selected, changes are applied to the current export only and are not saved for future use. Export settings can be changed and saved without a document save – choose Tools/Saving Preferences... .

Using multiple converters

Multiple converters allow you to export to two or more file types in one export step. Choose Multiple in the saving dialog box:

To make your own multiple converter, open the Saving Preferences dialog box from the Tools menu. Choose the heading Multiple converters. Select a converter and click Create from... . This will make a copy of the selected converter that you can freely modify without overwriting the original one.

The new converter appears in the list. Select it and click Options... to specify its settings. You receive a list of all text converters,

followed by all image converters. Checkmark the desired ones. Optionally specify sub-folder paths for each file type.

You can save pages with different formatting levels or file options to the different file types, as defined in their simple converters. A few saving operations cannot be done with multiple converters. These are:

Saving OmniPage Documents
Use a workflow with two saving steps, or perform two separate saves.

Saving to two targets
For instance, you cannot use a multiple converter to save a document to file and also send it in mail. Use a workflow with two saving steps, or perform two separate saves.

Saving different page ranges
You cannot save different page ranges to different file types, because only one set of selected pages can exist at saving time. For the same reason, a single workflow cannot be used either. Perform two separate saves or use two workflows.

Saving to PDF

You have five choices when saving to Portable Document Format (PDF) files. The first four are presented as Text converters, the last one is listed among the Image converters.

PDF (Normal):
Pages are exported as they appeared in the Text Editor in True Page view. The PDF file can be viewed and searched in a PDF viewer and edited in a PDF editor.

PDF Edited:
Use this if you have made significant editing changes in the recognition results. You have three formatting level choices,

including True Page. The PDF file can be viewed, searched and edited.

PDF Searchable Image (formerly PDF Image on Text):
The PDF file is viewable only and cannot be modified in a PDF editor. The original images are exported, but there is a linked text file behind each image, so the text can be searched. A found word is highlighted in the image.

PDF with image substitutes:
As for PDF (Normal), but words containing reject and suspect characters have image overlays, so these uncertain words display as they were in the original document. The PDF file can be viewed, searched and edited.

PDF Image (formerly PDF, image only):
The original images are exported. The PDF file is viewable only and cannot be modified in a PDF editor and text cannot be searched.

Besides the above flavors, you can use other parameters in defining your PDF output by clicking Options:

PDF 1.6
Save to PDF version 1.6 for enhanced security, markup and attachment embedding functionality.

PDF/A
Choose to create PDF/A compliant files to be confident that files display identically regardless of the computer environment and remain readable even after many years of technological evolution.

Tagged PDF
Create a tagged PDF file to preserve its structure. This will ensure logical reading order, correct table structure and more.

PDF MRC

Use this high compression technology for good quality *and* smaller file size. Available for color and grayscale PDF Images or PDF Searchable Images.

Linearized PDF

Choose this to create PDF files optimized for fast loading and display when embedded in web pages.

Password protection

In OmniPage Professional you can set a type and level of encryption and then define an Open password and/or a Permissions password for PDF files.

A smaller range of choices is available for saving to XPS files, provided that you have Microsoft .NET Framework 3.0 installed.

Converting from PDF

To extract text content from a PDF file, load it into OmniPage, recognize it, and save the results to a text format.

A variety of outputs is also available from a PDF file shortcut menu: Word, Excel, RTF, WordPerfect or text. For more options, use the Convert Now Wizard.

Creating PDF files from other applications

The Nuance PDF Create product supplied with OmniPage Professional provides the ability to create Normal PDF files from documents in any print-capable application on your system. Click File / Print and select the printer **ScanSoft PDF Create!** Adjust properties as desired and click OK and supply a file name and location. If *View resulting PDF* is selected, your default PDF viewer displays the result.

Sending pages by mail

You can send page images or recognized pages as one or more files attached to a mail message if you have installed a MAPI-compliant mail application, such as Microsoft Outlook. To send pages by e-mail:

- With automatic processing, select Send in Mail as the setting in the Export Results drop-down list on the OmniPage Toolbox. The Export Options dialog box appears as soon as the last available page in the document is recognized or proofed. After export options are specified, an empty mail message appears with file(s) attached - add recipients and message text as desired.
- With manual processing, select Send in Mail as the setting in the Export Results drop-down list and then click its button. The Export Options dialog box appears immediately and then the mail message with the attachment(s).
- Workflows and jobs accept a Send in Mail export step, but they require the recipients and message text to be specified as workflow settings, so the workflow can be run unattended.

Sending to Kindle

A Kindle reader is an electronic book product from Amazon. The Kindle Assistant in the Tools menu lets you create a simple workflow that sends recognition results to a Kindle account at Amazon; these results are optimized for reader display and appear on the Kindle device registered to that account.

To prepare a Kindle workflow:

1. Have your Kindle reader and its associated e-mail address on hand.

2. Choose Kindle Assistant in the Tools menu.
3. Type in a name for the new workflow.
4. Choose a document source: Scan, Load files or Load digital camera files. With file input, you will be prompted to choose input files when the workflow starts running.
5. Enter the e-mail address linked to your Kindle reader.
6. Provide a name for the output file. All recognition results enter a single file.
7. Choose *Save* to save the workflow for later use, or *Save and Run* to immediately run the workflow and transfer its results to your Kindle device.

This simple workflow has three steps: acquire images, perform OCR and send to Kindle. All settings take either default values or values optimized for Kindle.

When you run the Kindle Assistant for the first time, a customized output converter is created, called 'Kindle Document'. It converts colored items to grayscale, pictures to 72 dpi and sets Formatted Text to remove any columns. This converter is then available for later processing - with or without workflows.

You can modify the Kindle workflow using the Workflow Assistant, to add other steps and change settings. For instance you can specify a page range or add more saving steps, so the file is not only sent to Kindle, but also saved to file with different settings (for instance with Flowing Page and color retention). Take care not to make modifications that are unsuitable for Kindle - e.g. creating multiple output files, setting non-supported languages etc.

You can also compile workflows targeting Kindle with the Workflow Assistant; set a Send in Mail step, choose the Kindle output converter in its settings and enter the Kindle e-mail address. You can do the same without using a workflow by choosing Send in Mail in the Export results drop-down list.

Other export targets

Turn recognized text into an audio wave file for later listening, using Nuance RealSpeak. A multiple converter is useful for this, allowing you to save the document to file and generate the wave file in one saving step. You must specify the reading language in the converter options for the wave file type.

In OmniPage Professional 17 you can export files to other targets. You can save files to a central server (an FTP site), to Microsoft SharePoint 2003 and 2007, to Hummingbird (Open Text) or iManage (Interwoven). Exporting choices are made in the Export Options dialog box. When you click OK you are directed to FTP or SharePoint log-in and invited to specify the required path.

When using SharePoint, the server, login and password information must be provided only once per session, and it is offered in each subsequent session.

If an ODMA-compliant Document Management System (DMS) is detected in your computing environment, it will be offered. If you have access to more than one DMS, the system default will apply. The ODMA server must be pre-configured to accept the file types to be exported from OmniPage Professional, as defined by their extensions.

See Help for more information on these targets.

Workflows

A workflow contains a series of processing steps and their settings. It can be saved for repeated use whenever you have a task needing the same processing. Workflows usually begin with a scanning or loading step, but they can also start from the document currently open in OmniPage. After that, they do not have to conform to the traditional 1-2-3 processing pattern. Usually a workflow will include a recognition step, but this is not compulsory. For instance, page images can be saved to image files in a different file type or to an OmniPage Document. With or without OCR, any number of saving steps are possible, even to different targets, each with their own export settings.

Workflows are designed for efficient whole-document processing. They can also handle recognizing or saving single or selected pages from a document.

Some workflows run without user interaction. Workflows needing interaction are those with a manual image enhancement step, a manual zoning step, a proofing/editing step, the ones when run-time prompting is requested for input or output file names and paths, or scanning workflows prompting for more pages.

Batch Manager jobs are closely related to workflows. Jobs are created in the Job Wizard which uses the Workflow Assistant in the creation process. Jobs run workflows according to the job parameters (mostly timing instructions) and it is more typical for them to run unattended.

Sample workflows

Sample workflows are provided with OmniPage 17 to offer you typical work processes. Choose one in the Workflow drop-down list at the left side of the OmniPage Toolbox.

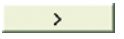
Click the Workflow Assistant button in the Standard toolbar to see its steps and settings.

Running workflows

Here is how to run a sample workflow or one you have created:

1. If your workflow takes input from scanner, place your document in its ADF or its first page on the scanner bed.
2. Select the desired workflow from the Workflow drop-down list.

3. Press the Start button. The OmniPage Toolbox displays the steps in the workflow and acts as a progress monitor. The Workflow Status panel shows progress in more detail. To stop the workflow before it completes, press the Stop button.
4. If run-time input selection is specified, the Load Files dialog box awaits your choice of files.
5. If you requested a step requiring interaction (image enhancement, manual zoning, or proofing) the program presents pages for attention.
6. When a page is enhanced, zoned or proofed, click the Page Ready button in the Toolbox or appropriate dialog box to move to the next page.



7. When the last page is enhanced, zoned or proofed, or when you no longer want to do zoning or proofing, press the appropriate

Document Ready button on the Toolbox. Any pages without zones will be auto-zoned.

8. The After Completion menu under Process / Workflows gives you three options to end a workflow. You can choose to close the document, close OmniPage, or shut down your computer. These settings are typically applied if the workflow runs unattended - if your workflow is so, remember to include a saving step.

You can also run workflows from an OmniPage Agent icon on the Windows taskbar. Right-click it for a shortcut menu listing your workflows. Select one to run it. OmniPage will be launched if necessary. If it is running with a document loaded, the Start Workflow dialog box displays where you can choose what to process from the current document: only the Workflow-defined pages, all pages, selected pages, or the current page.

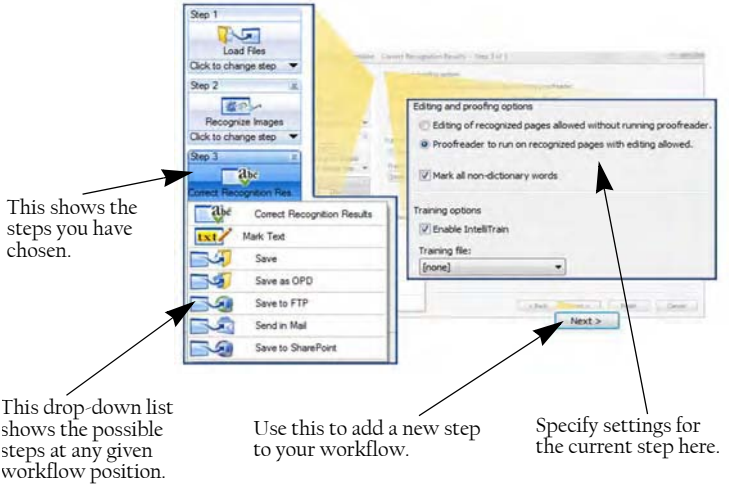
If you do not see the OmniPage Agent icon, enable it in the General panel of the Options dialog box or choose Start › All Programs › Nuance OmniPage 17 › OmniPage Agent.

You can launch some workflows from your desktop, from Windows Explorer or the Easy Loader. Right click on an image file icon or file name for a shortcut menu. Multiple file selection is possible. Choose OmniPage 17 and a workflow name from the sub-menu. This sub-menu also provides quick access to six target formats using default settings: Word, Excel, PDF, RTF, TXT and WordPerfect. To customize which workflows you would like to see here, click the Add and Remove Workflows menu item. Only workflows with run-time prompting for input files are listed here.

Pressing Stop while a workflow is running pauses it. Click Start to resume processing. If you pause a workflow, maybe do some manual processing, and then save the document as an OmniPage Document, when you later open that OmniPage Document, the interrupted workflow will resume.

Workflow Assistant

This allows you to create and modify workflows. The Job Wizard also uses this to create or modify workflows that jobs execute - see the next section. The Assistant offers one or more steps, each with a drop-down list. This left panel of the Workflow Assistant dialog box lets you build your workflow.



Click the Close button to delete a workflow step.

All subsequent, dependent steps will also be removed.

To change a step, click this arrow and select from the ones in the drop-down list.

At any moment in the process, the Assistant drop-down menu offers all steps that are logically possible at that point.

In OmniPage 17 Professional, additional steps are available: Extract Form Data and Mark Text.

Creating workflows

Select New Workflow... in the Workflow drop-down list, or from the Process menu. Or click the Workflow Assistant button in the Standard toolbar when no workflow is selected.

The opening Assistant panel offers two starting points:

Choose **Fresh Start** to begin with no steps in the workflow diagram on the right. Accept or change the default workflow name. Then click Next and choose your first step. Choose an image loading step that can take input from file, scanner or digital camera files. Specify settings on the right. Then move on to build your workflow: it can include a variety of different steps. When done, click Finish.

Choose **Existing Workflows** to see a list of existing workflows. These are the sample workflows plus any you have created. Select one as source. Its steps will appear in the workflow diagram on the right. Enter a name for your new workflow. Click Next to proceed; modify its steps and settings as described in the next section. The changed settings apply to the new workflow only and are not written back to the workflow used as the source. Any changed settings enter the new workflow, but do not affect the settings in the program. Finally, select Finish to complete your new workflow.

Modifying workflows

Select the workflow you want to modify in the Workflow drop-down list and click the Workflow Assistant button in the standard toolbar. Or choose Workflows... in the Tools menu, select the desired workflow and click Modify... . The first panel of the Workflow Assistant appears with the workflow loaded. Click the icon in the workflow diagram that represents the step you want to modify. Click the downward pointing arrow under the icon to replace this step with another one. Continue modifying steps and/or settings as desired. Remember that deleting or modifying a step may result in later, dependent steps being removed. Click Next to replace removed steps or to add new ones. Click Finish to confirm the changes to your workflow.

After creating or modifying a workflow, you must either run a workflow or select the 1-2-3 item in the Workflow drop-down list, to return to normal processing.

Workflow to Kindle

The Kindle Assistant in the Tools menu helps you create a simple workflow that will accept input, perform OCR and send the results in a suitable format to a Kindle account at Amazon; it will then appear on the Kindle device registered to that account. See "Sending to Kindle" on page 83.

Batch Manager

The Batch Manager is a separate but integrated program to let you create jobs to be processed immediately, or at some time in the future. By choosing steps carefully, you can set up jobs that can run unattended. A job executes a

workflow according to the job settings. Jobs are created in the Job Wizard.

In OmniPage Professional 17 you have the following additional Batch Manager capabilities:

- Setting job timing and recurrence
- Folder watching for incoming image files
- E-mail inbox watching for incoming attachments (Outlook and Lotus Notes)
- E-mail notification of job completion to specified recipients
- Driving workflows with barcodes.

Creating new jobs

Open the Batch Manager from the Process Menu or from your system, by choosing Start › All Programs › Nuance OmniPage 17 › OmniPage Batch Manager or from the OmniPage Agent on the taskbar.

Creating a job is basically timing a workflow. To do this, start the Batch Manager (as described above) and click the Create Job icon or choose Create Job from the File menu.

The Job Wizard starts. First you need to define your job type. You can create five different types, instances of two basic categories: Normal and Watch type.

Normal and Watch type jobs may have a recurrence pattern. The latter are tailored to monitor a specified folder or e-mail inbox for incoming images to be processed in OmniPage. A specific type within this category is Barcode cover page jobs, where barcode cover pages are used to identify which workflow to carry out.

Normal job: Set starting time and specify or create the Workflow to be run. If you select 'Do not start now' use the Activate button in the Batch Manager to start it.

Job types available in OmniPage Professional 17 only:

Barcode cover page job: This is a special type of folder watching job (see below). It monitors a folder for incoming barcode pages, then processes subsequently incoming images with the workflow identified by the barcode. For details, see Barcode processing later in this chapter.

Folder watching job: Select this job type and browse to the folder(s) to be watched for incoming image files.

Outlook mailbox watching job: This job watches an Outlook e-mail inbox for incoming image attachments of a specified type.

Lotus Notes mailbox watching job: Same as above, but a Lotus Notes inbox is watched.

Name your job and click Next.

The next panel shows Start and Stop Options. Specify Start and End Time, set whether input files are to be deleted or saved when the job is completed. If you have a job requiring user interaction, choose whether to allow it or not with the checkmark *Run job without any prompts*. This lets you run such jobs in two ways, avoiding the need to create two jobs. If you plan to be at the computer as the job runs, de-select the checkmark. If you want to run the job without being present, select the checkmark. Then only automatic image enhancement will run, auto-zoning will replace manual zoning and proofing is skipped. In this case you must ensure that the input and saving file sets and locations are pre-defined.

In OmniPage Professional you can set a recurrency pattern and request e-mail notification when the job is completed.

From the next panel onwards, you can construct your job (except for barcode cover page jobs) as you normally do with Workflows. Set your starting point (Fresh Start or Existing Workflows) and proceed as described in the Workflows topic.

The Options dialog box in the Batch Manager is in the Tools menu. Its General panel has an option *Enable OmniPage Agent on system tray at system startup*. By default it is on. It must remain selected for jobs to run at their scheduled time. The option is provided so it is possible to prevent all jobs from running without having to disable them individually. Its state also governs the running of barcode cover page jobs.

The General panel lets you limit the number of pages allowed in an output document, even if the file option *Create one file for all pages* is selected. When the limit is reached, a new file is started, distinguished by a numerical suffix.

Click Finish to confirm job creation.

Modifying jobs

Jobs with an inactive status can be modified. Select the job in the left panel of the Batch Manager and choose Modify from the Edit menu or click the Modify Job button. First, modify timing instructions as desired. Then the Workflow Assistant appears with the workflow steps and settings loaded. Make the desired changes as already described for workflows. See "Modifying workflows" above.

Managing and running jobs

This is done with the Batch Manager. It has two panels. The left panel lists each job, its next run, status and history. The status is:

Waiting:	Scheduled but job start time is in the future.
Running:	Processing is currently underway.
Watching:	Watching is in progress but there is no processing.
Inactive:	Created with timing instruction: *Do not start now*; or any deactivated jobs.
Expired:	Scheduled job but start time is in the past.
Collecting:	Watching in progress but the job is waiting for all incoming files to arrive.
Paused:	User has paused the job and not yet resumed it.
Closing:	Watch type job is saving its result.
Starting:	The status right before Running. Displays when a job is just being started or when more jobs are about to run than the number of jobs Batch Manager can simultaneously run.

Click on a job and a step-by-step analysis of all pages in the job appears in the right panel. It shows where input was taken from, the page status and where output was directed to. Click on a plus icon to see more information about the page. Click on a minus icon to hide details. For jobs with the error or warning status, the listing shows which pages failed or what problems occurred.

Activate Job in the File menu serves to activate any inactive job immediately.

Deactivate Job in the File menu deactivates any active job. If the job is running, this will stop it before deactivating. Choose this to close a Watch type job immediately to save its result.

Stop Job in the File menu stops a job with status Starting, Running, or Paused.

Pause Job is available for jobs with status Running or Starting. To modify such a job's timing instructions you must stop it.

Resume Job lets the job continue from its state when it was paused.

Delete Job in the Edit menu serves to delete the currently selected job. Only Inactive jobs can be deleted.

Rename Job serves to modify the name of any job.

Use the Edit menu to send a copy of a job's status report to Clipboard.
Use Save OPD As... in the File menu to save any intermediate result of a paused job to an OPD file.

To remove data files click Edit, then choose **Clear Occurrence**. This removes files storing the reporting data from the current occurrence of the current job. **Clear All Occurrences** removes all data for all job occurrences of the selected job. These two options are useful to free disk space, but cleared occurrences cannot be viewed any more, so use these with caution.

The Workflow viewer

The Workflow viewer, as displayed in the Workflow Status panel, is integrated into the Batch Manager to the right of the list of your jobs. Use it to get comprehensive and detailed information about the processing of each occurrence of the job. The viewer shows the process in a step-by-step fashion - following the steps of the workflow. It displays input and output page information at each stage, allowing you to quickly view any page. Job results are marked by icons. Drop-down lists give you information about processing steps.

Watched folders

In OmniPage Professional 17, you can specify watched folders and e-mail inboxes (Outlook and Lotus Notes) as job input. These allow processing to be started automatically whenever image files are placed in pre-defined folders or arrive into inboxes as e-mail attachments. This is useful to have sets of files with predictable content arriving from remote locations processed automatically on arrival, even if no-one is in attendance. Typically these are reports or form-like documents that are delivered repeatedly or at recurring intervals, for example each week or month.

To use this facility, prepare a set of folders or e-mail folders to be watched. You should not use these folders for other purposes, not even for barcode cover page jobs. When setting up such a job, choose Folder watching job, name it and click Next. In the dialog box that appears, browse to the folders.

Add a watched folder to the list using this Browse for Folder dialog box.

Specify an image file type.

Add the desired folders and file types (one type or all types). Click the checkbox in front of your selected folder to include its subfolders as well. To enable a number of file types, add the Folder

repeatedly, once for each type. Add a checkmark to watch subfolders of the selected folder as well.

When you reach the next panel of the Job Wizard, you set the timing instructions: a starting time and an end time for the watching to occur. You can specify recurrences, for instance to have the folder(s) watched only during your lunch hour (Start 12.15, End 13.05) every Monday, Wednesday and Friday, or overnight in the last three days of each month, when you keep your computer running to collect and process monthly reports arriving from afar.

When files enter a watched folder, the program waits for approximately the interval specified in Batch Manager Options for more files to arrive in order to process them together. When files cease to arrive, processing starts.

To finish the watching early, choose Deactivate Job. Then you can modify the job freely.

Watched mailboxes

In OmniPage Professional 17, you can specify watched mailboxes as job input. These allow processing to be started automatically whenever image files of specified file types are placed in pre-defined e-mail folders. This is useful to have sets of files with predictable content arriving processed automatically on arrival, even if no-one is in attendance.

The program supports watching Microsoft Outlook and Lotus Notes mailboxes.

Barcode processing

In OmniPage Professional 17, you can run workflows (sets of steps and their settings) using barcode cover pages that define which workflow should run. A barcode cover page identifies a workflow (with workflow identifier, workflow name and workflow steps) and contains information on workflow creation (name of the creator, date of creation, etc.). Note that barcode processing cannot be recurrent.

There are two ways of doing barcode processing:

Scanner input:

Workflow processing is driven by placing the cover page on top of a document to be scanned and pushing the scanner's Start button.

Image file input:

Job processing is driven by copying the barcode cover page image into a watched folder that will receive the document images to be processed.

For scanner input you have to

1. Create a workflow that contains the processing steps you need with Scan Images as first step.
2. Print a barcode page that identifies the workflow.
3. Start barcode processing from the scanner.

To scan with a barcode page:

1. Place the barcode cover page on the top of the document in the ADF.
2. Press the Start button on the scanner.

3. Select “Barcode cover page workflow” as Scanner button default action on the Scanner tab of Options. You can also set it to *Prompt for workflow*. In this case, a dialog box appears with the available choices: Scanning, Barcode cover page workflow, and all scanning workflows.

All available pages will be processed by the specified workflow, or until a new barcode page is encountered. The result will be saved as specified by the workflow.

For image input you must create a barcode cover page job.

A barcode cover page job uses a special kind of watched folder. Always use a separate folder for barcode processing. The starting time for the workflow is defined by the moment the barcode cover page enters a watched folder.

For a barcode cover page job processing you need to

1. Create a workflow that contains the processing steps you need. Select Load Files as input with “Select files for loading each time this workflow is started” selected.
2. Save a barcode cover page that identifies the workflow.
3. Define timing instructions for barcode folder watching in the Batch Manager by creating a barcode cover page job.

To process with a barcode cover page job:

1. Make sure that the job is running at the required time.
2. The folder is being monitored and the workflow will be started as soon as a barcode cover page is placed in the specified watched folder.
3. The workflow will process image files arriving in the folder after the cover page.

4. The workflow will be completed at the specified end time of the job, or each time a new barcode cover page is detected.

You can copy the barcode cover page image and the image files into the watched barcode folder yourself, or direct others to do this. You can also place just a barcode cover page image file in the watched folder, then have a network scanner make and send image files there.

File-it Assistant

The File-it Assistant lets you create scanning workflows for repeated document conversion tasks. The Assistant is for scanning jobs that require no user interaction during the processing. In a typical scenario operators at a scanning station prepare documents, applying the appropriate barcode cover page to each, without needing to know anything about the later processing or destination of the documents, because all that is pre-determined. Associate a button on your scanner with OmniPage (see Chapter 3 under Scanning) and print a barcode cover page to identify your workflow. As a result, you can scan, convert and save without interaction beyond pressing the scanner button.

Create the workflow:

1. Select File-it Assistant from the Tools menu.
2. Name your workflow, choose an output file type, location and file name.
3. Review and optionally change the workflow settings.
4. Print the barcode cover page.
5. Associate OmniPage with a scanner button (must be done only once) in the Control Panel. See “Scanning to OmniPage and workflows” on page 39.

Use the workflow:

1. Place the printed barcode cover page on top of a document in your scanner.
2. Push the OmniPage-associated scanner button. The document will be converted using steps and settings from the referenced workflow and sent to the location you defined.

It is possible to use barcode cover pages stored as image files to drive jobs from watched folders. Such jobs permit interactive steps like manual zoning and proofing that are not available via the File-it Assistant.

Technical information

This chapter provides troubleshooting and other technical information about using OmniPage 17. Please also read the Readme file and other help topics, or visit the Nuance web pages.

Troubleshooting

Although OmniPage is designed to be easy to use, problems sometimes occur. Many of the error messages contain self-explanatory descriptions of what to do – check connections, close other applications to free up memory, and so on.

Please see your Windows documentation or OmniPage Help for information on optimizing your system and application performance.

Supported file formats are listed here, Help provides more detail.

Solutions to try first

Try these solutions if you experience problems starting or using OmniPage:

- Make sure that your system meets all the listed requirements. See the Installation and setup chapter.
- Make sure that your scanner is plugged in and that all cable connections are secure.
- Visit the support section of Nuance's web site at www.nuance.com. It contains Tech Notes on commonly reported issues using OmniPage. Our web pages may also offer assistance on the installation process and troubleshooting.

- Use the software that came with your scanner to verify that the scanner works properly before using it with OmniPage.
- Make sure you have the correct drivers for your scanner, printer, and video card. Visit Nuance's web page through the Help menu and consult its scanner section for more information.
- Defragment your hard disk. See Windows online Help for more information.
- Uninstall and reinstall OmniPage, as described in the section, "Uninstalling the software" in the Installation and setup chapter.

Testing OmniPage

Restarting Windows XP or Vista in its safe mode allows you to test OmniPage on a simplified system. This is recommended when you cannot resolve crashing problems or if OmniPage has stopped running altogether. See Windows online Help for more information.

To test OmniPage in safe mode:

1. Restart your computer in safe mode by pressing F8 immediately after you see the 'Starting Windows' message.
2. Launch OmniPage and try performing OCR on an image. Use a known image file, for instance one of the supplied sample image files.
    - If OmniPage does not launch or run properly in safe mode, then there may be a problem with the installation. Uninstall and reinstall OmniPage, and then run it in Windows safe mode.

- If OmniPage runs in safe mode, then a device driver on your system may be interfering with OmniPage operation. Troubleshoot the problem by restarting Windows in Step-by-Step Confirmation mode. See Windows online Help for more information.

Text does not get recognized properly

Try these solutions if any part of the original document is not converted to text properly during OCR:

- Look at the page image and ensure that all text areas are enclosed by text zones. If an area is not enclosed by a zone, it is generally ignored during OCR. See the section on creating and modifying zones, in the "Processing documents" Chapter.
- Make sure text zones are identified correctly. Reidentify zone types and contents, if necessary, and perform OCR on the document again. See "Zone types and properties" in the "Processing documents" Chapter.
- Be sure you do not have an unsuitable template loaded by mistake. If zone borders cut through text, recognition is impaired.
- Adjust the brightness and contrast sliders in the Scanner panel of the Options dialog box. You may need to experiment with different settings combinations to get the desired results.
- Use the Image Enhancement Tools to optimize your image for OCR.
- Check the resolution of the original image. Hover the cursor over a page thumbnail for a popup display. If the resolution is significantly above or below 300 dpi, recognition is likely to suffer.

- Make sure the correct document languages are selected in the OCR panel of the Options dialog box. Only languages included in the document should be selected. In particular, setting an Asian language for non-Asian texts (and vice versa) is likely to produce unusable results.
- Recognition results in Japanese, Korean and Chinese can be viewed and saved only if your system has East Asian language support. See "Asian language recognition" on page 61.
- Turn IntelliTrain on and make some proofing corrections. This is most likely to help with stylized fonts or uniformly degraded documents. If IntelliTrain was running, try turning it off – on some types of degraded documents it may not be able to help. See "IntelliTrain" on page 64.
- Do some manual training, or edit existing training to remove unsuccessful training.
- If you use True Page as the Text Editor formatting level or for export, recognized text is put into text boxes or frames. Some text may be hidden if a text box is too small. To view the text, place the cursor in the text box and use the arrow keys on your keyboard to scroll to the top, bottom, left, or right of the box.
- Check the glass, mirrors, and lenses on your scanner for dust, smudges or scratches. Clean if necessary.

Problems with fax recognition

Try these solutions to improve OCR accuracy on fax images:

- Ask senders to use clean, original documents if possible.
- Ask senders to select Fine or Best mode when they send you a fax. This produces a resolution of 200 x 200 dpi.

- Ask senders to transmit files directly to your computer via fax modem if you both have one. You can save fax images as image files and then load them into OmniPage. See "Input from image files" in the Processing documents Chapter.

System or performance problems during OCR

Try these solutions if a crash occurs during OCR or if processing takes a very long time:

- Check image quality. Consult your scanner documentation on ways to improve the quality of scanned images.
- Break complex page images (lots of text and graphics or elaborate formatting) into smaller jobs. Draw zones manually or modify automatically created zones and perform OCR on one page area at a time. See "Working with zones" in the Processing documents Chapter.
- Restart Windows XP or Vista in safe mode and test OmniPage by performing OCR on the included sample image files.

If you are performing multiple tasks at once, such as recognizing and printing, OCR may take longer.

Supported file types

Supported image file formats for loading are TIFF, PCX, DCX, BMP, JPEG, JB2, JP2, GIF, PNG, XIFF, MAX, PDF, XPS and HD Photo.

Supported file types for saving recognition results as text are:

HTML 3.2, 4.0
Microsoft Excel 97, 2000, XP, 2003, 2007
Microsoft PowerPoint 97
Microsoft Publisher 98
Microsoft Word 97, 2000, XP, 2003 (WordML), 2007

OmniPage Documents

PDF (Normal), Edited, with image on text, with image substitutes

RTF Word 6.0/95, RTF Word 97, RTF Word 2000, RTF 2000 ExactWord

WordPad

WordPerfect 12, X3

Text, Text with line breaks, Text - Formatted, Text - Comma Separated

Unicode Text, Unicode Text with line breaks, Unicode Text - Formatted, Unicode Text - Comma Separated

Wave Audio Converter (to save recognized text being read aloud)

In OmniPage Professional 17 there is also support for:
eBook, Microsoft InfoPath (for forms), Microsoft Reader, and XML.

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PPDM PDF Converter
Module 7

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This Guide shows screen pictures made with Windows® XP. The appearance may vary under other Operating Systems.

Why are PDF files popular?

The Portable Document Format has become a de-facto standard for document exchange across platforms and computing environments. More than 200 million PDF documents are posted on the World Wide Web. Key benefits that have driven this popularity are:

- **Integrity:** PDF files look like the original documents they were created from. They conserve their appearance after sharing - regardless of platform, operating system, installed fonts or local settings on each computer or device.
- **File size:** In many cases, PDF files can be more compact than their source documents - ideal for file transfer.
- **Security:** PDF files can be digitally signed and password protected to prevent unauthorized changes.
- **Sharing:** While the basic document content can be frozen, commenting and mark-up tools allow collective authoring and document review.

What PDF Professional does for you

Nuance® PDF Converter Professional 7 from Nuance Communications Inc., offers the full circle of functionality for handling PDF files. It can unlock and open PDF files up to version 1.7 for viewing, editing, annotation and re-assembly. It can create PDF files from versions 1.3 to 1.7 (PDF/A format is also supported). It can unlock PDF files for repurposing in other applications.

This professional product has three parts for creating, editing and unlocking PDF files. These are all installed and activated with a single procedure.

Create PDF Files

Nuance® PDF Create 7 lets you create PDF files from a wide range of file types. The Print dialog box in your print-capable applications will offer a printer named **ScanSoft PDF Create!** The PDF Create Assistant lets you compile a list of files generated by different applications. You can also create PDFs from XPS files. Each file can be converted to a separate PDF file, or they can be combined, overlaid or packaged into a single file. When working in Microsoft® Word™, Excel®, or PowerPoint you can call on the program to create a PDF file directly from your current document. During conversions hyperlinks and comments can be transferred and you can set bookmarks to be generated from the structure of the Word document, each worksheet in Excel or for each slide in a PowerPoint presentation. Document information (metadata) can also be transferred. When working in Microsoft Outlook® or Lotus Notes®, message attachments can be saved as PDF files. As you write a new message or a reply, you can choose a non-PDF file from your computer to have it converted to PDF and attached.

The program can create PDF files in versions 1.3 to 1.7 and PDF/A. Files can be protected by passwords and can include watermarks. Compression and font settings give you control over PDF file size and appearance.

Edit PDF Files

Nuance PDF Converter Professional gives you extensive control over your PDF files through an easy-to-use browsing and reading interface. You can edit pages and documents, annotate and review them, adjust document security, sign your documents and more. PDF documents can be compiled from different sources and pages can be rearranged. The program delivers a powerful document management system: use it to create archives from related documents to index and search them later. Alternatively, in the Enterprise edition, you can access different document management systems through the application: use them to store or archive your PDF documents.

Export PDF Files

Nuance® PDF Converter 7 lets you unlock PDF and XPS files to edit them as Microsoft® Word™, Microsoft® Excel®, Microsoft® PowerPoint®, Corel® WordPerfect™, and generic RTF files. It also lets you open PDFor XPS files directly from these and other applications, edit them and save them in the appropriate file type. It converts PDF files up to and including version 1.7. Encrypted PDF files can be opened if the required password is provided.

Installation and Activation

PDF Converter Professional 7 detects previous versions and components and prompts for your confirmation to remove them. You should have administrator rights on the computer to install and activate the program. You need web access for activation.

1. Insert the CD-ROM in your CD-ROM drive

The installation program will start automatically. If it does not, locate your CD-ROM drive in Microsoft® Windows® Explorer and double-click the program's AutoRun.exe file. Select a language for installation. The InstallShield® Wizard will appear.

(If you have downloaded the program from the Nuance web site, double-click its autorun.exe file.)

2. License and Serial Number

You must accept the license agreement in order to proceed. You must enter a serial number. You will find this on the CD sleeve or on the Nuance web site, or a reseller's site at the download location.

Some resellers let you see the serial number at a later time, by returning to your purchase order. Be sure to keep the serial number in a safe place; it is fully checked only during product activation and is also needed for any re-installations.

Serial numbers never include the letter "O", always use zero.

3. Location and Setup Type

The installer offers a default location for the program. Accept it or define a different one. Select Complete or Custom Setup. Choose Custom to accept or decline installation of the PDF unlocking component. Choose Custom also to enable or disable the integration of PDF Converter and PDF Create in other programs. By default, all the programs offered in the PDF Converter Professional Integration panels of the InstallShield Wizard will be enabled. (You can change integration settings later by choosing the program under Add or Remove Programs in the Control Panel and clicking Change and then Repair.)

4. Click Finish

Registration runs at the end of installation. Select Register Online to establish a connection to the Nuance web site. We provide an easy electronic form that can be completed in a few moments. When the form is filled, click Submit. If you decide not to register or to be reminded later, you can go to http://www.nuance.com to register online any time later. Click on Support and from the main support screen choose Product Registration. For a statement on the use of your registration data, please see Nuance's Privacy Policy.

5. Activate

You will be invited to activate the product at the end of installation. Please ensure that web access is available. Provided your serial number is found at its storage location and has been correctly entered, no user interaction is required and no personal information is transmitted. If you do not activate the product at installation time, you will be invited to do this each time you invoke the program. PDF Converter Professional creates PDF files with a trial watermark on each page if you use it without activation. *If you ignore the first five activation prompts, you must activate products separately and manually - a much more time-consuming process.*

You will be allowed to re-install the program a reasonable number of times without having re-activation problems, because un-installation includes a de-activation step. The serial number is needed for re-installation and web access is needed for de-activation and re-activation.

For registration and activation troubleshooting see the Nuance Knowledge Base at http://knowledgebase.nuance.com/.

Note: Keep the serial number of earlier versions, to retain the option of installing them on a different computer.

How to Get Help

This guide is available in a PDF file on the CD and after installation in the program folder. It can also be accessed from the About panel. When the program is delivered electronically, this PDF is available at the download site and is included in the download.

Nuance PDF Converter Professional has a comprehensive HTML Help system. Use the Help Menu to open it at its Introduction.

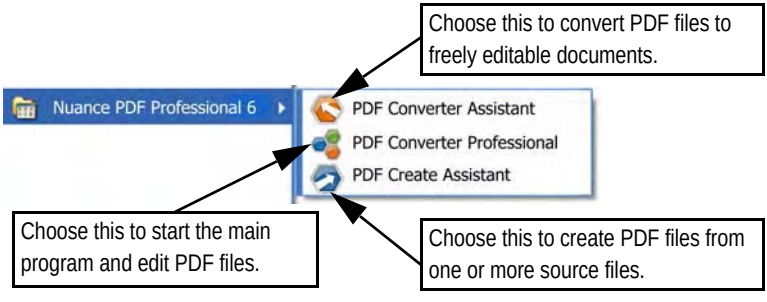
Press F1 to open Help: typically at the topic describing the currently open panel. Some dialog boxes have Help buttons.

A Release Notes file with latest information is available on the CD and in the program folder. The Nuance web site offers program information, with a regularly updated knowledge base and user forums.

Note: System requirements are presented on the product box and in Help.

Starting the Program

Choose Nuance PDF Professional 7 from the Windows Start Menu. This offers the following items:


Choose this to convert PDF files to freely editable documents.
Nuance PDF Professional 6
PDF Converter Assistant
PDF Converter Professional
PDF Create Assistant
Choose this to start the main program and edit PDF files.
Choose this to create PDF files from one or more source files.

Create PDF Files

Overview of creating PDF files

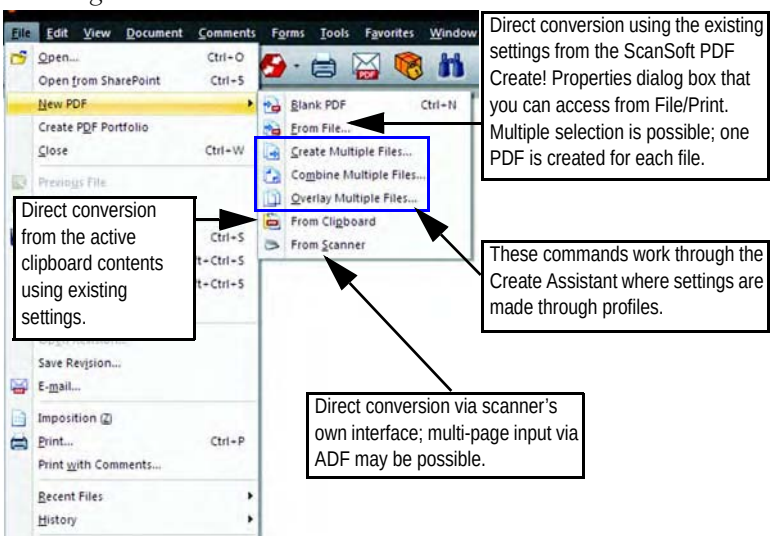
PDF Creation can be done from the following locations as described in the table and the following sections:

Location	Source files	Conversion method	Target
PDF Professional File menu or File toolbar	One or more local or DMS files, scanner or clipboard	Direct conversion from clipboard, scanner or files. Create Assistant to create, combine or overlay files.	PDF Professional as current PDF document
Print dialog boxes	Current document in the calling application	Individual settings. A page range can typically be specified	Pre-defined or via Save As
Windows Start Menu (plus optionally desktop, quick load bar and system tray)	One or more local or DMS files	Create Assistant, using profiles; page ranges are not supported	User defined. To local file, to e-mail or both
Windows Explorer shortcut menu	One or more whole local files	Direct conversion using a chosen profile and assembly instruction	Pre-defined or via Save As to local file, to e-mail or both
Microsoft Word (Create PDF button)	Whole current Word file	Direct conversion with current settings. Word and general settings can be accessed from Word	Via Save As to local file, to e-mail or both
Microsoft Excel (Create PDF button)	Current Excel workbook or worksheet	Direct conversion with current settings (can be accessed from Excel)	Via Save As to local file, to e-mail or both
Microsoft PowerPoint 2007(Create PDF button)	Whole current presentation	Direct conversion with current settings (can be accessed from PowerPoint)	Via Save As to local file, to e-mail or both
Microsoft Outlook and Lotus Notes (out)	One or more attachments to a mail message	Direct conversion of all attachments or with a selection box. Settings can be accessed	Pre-defined or via Save As to a local file

Location	Source files	Conversion method	Target
Microsoft Outlook and Lotus Notes (in)	One or more files on the local computer	Direct conversion using current settings (no access to settings)	PDF attached to current message
Microsoft Internet Explorer	Current web page or a link to another page	Direct conversion with current settings. Settings can be accessed from Explorer	Via Save As to local file, to e-mail or both

Create PDFs from PDF Professional

Click the New PDF button in the Main toolbar of PDF Professional, or select New PDF from the File menu. See the picture below. You can create a blank PDF or choose From File... to select one or more files from an Open dialog box, even if they were created in different applications. The next three commands lead to the PDF Create Assistant giving you full control over the creation process. You can also drag-and-drop files created in a print-capable application onto the PDF Converter Professional workspace. In this case the behavior is the same as when choosing From File... .

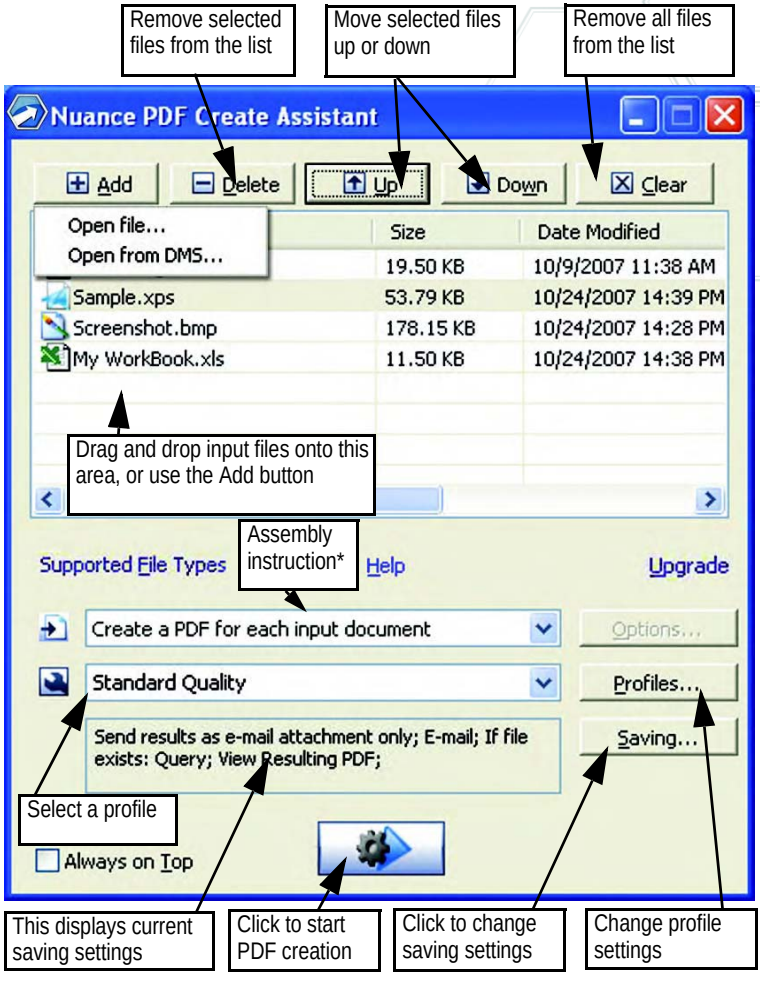

File Edit View Document Comments Forms Tools Favorites Window
Open... Ctrl+O
Open from SharePoint Ctrl+5
New PDF
Create PDF Portfolio
Close Ctrl+W
Blank PDF Ctrl+N
From File...
Create Multiple Files...
Combine Multiple Files...
Overlay Multiple Files...
From Clipboard
From Scanner
Save Revision...
E-mail...
Imposition
Print... Ctrl+P
Print with Comments...
Recent Files
History
Direct conversion using the existing settings from the ScanSoft PDF Create! Properties dialog box that you can access from File/Print. Multiple selection is possible; one PDF is created for each file.
Direct conversion from the active clipboard contents using existing settings.
These commands work through the Create Assistant where settings are made through profiles.
Direct conversion via scanner's own interface; multi-page input via ADF may be possible.

Create PDFs from Print dialogs

The Print dialog box appearing in your print-capable applications will include a PDF Create printer. Load a file you want to make a PDF from, then select File/Print. Select **ScanSoft PDF Create!** as the name of your printer. Specify a page range and other settings as desired. One PDF file is created; the number of copies value is ignored. Click Properties to check or change PDF Create settings. Click OK to start the creation. By default the Save As dialog appears, but you can give automated saving instructions under Properties/PDF Settings.

Use the PDF Create Assistant

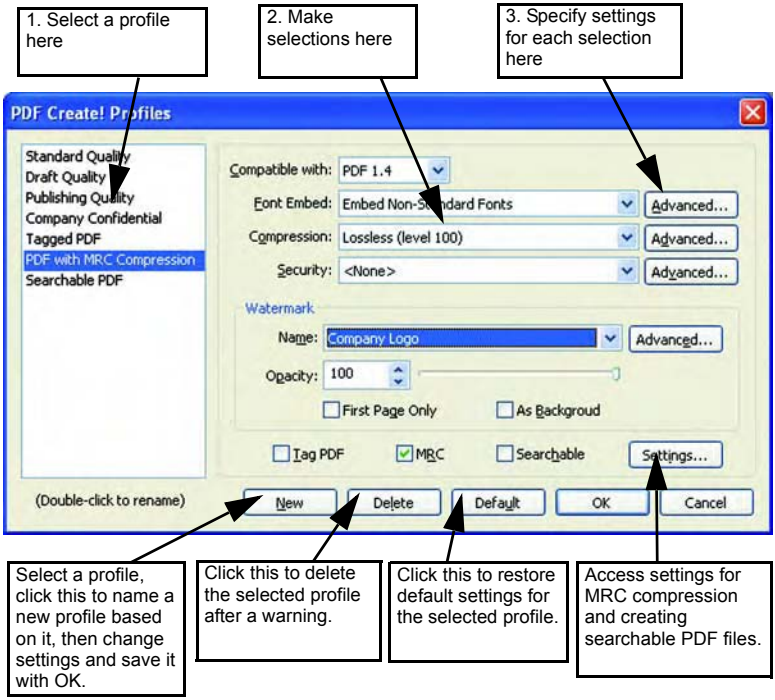
The Assistant is called from the Windows Start menu. It lets you compile a list of files to be converted. These files may have been created in different applications. Choose to combine the files in the given order to create a single PDF file or have each file converted separately. You can package a set of files into a single PDF. Files can also be overlaid for the conversion. The Assistant lets you use profiles to control the PDF creation. Profiles contain a group of settings designed for a particular outcome. The program includes seven profiles; you can create more for your own needs. Help explains how to do this.



* other assembly instructions are:

- Combine files into a single PDF (in listed order and ability to generate a bookmark for each input file)
- Overlay files (with overlay options)
- Package files as PDFs inside a container PDF (with options)

Click the **Profiles...** button to change settings for any profile, or to create a new profile based on an existing one.



For information on making tagged or searchable PDF files, and the benefits of applying MRC compression, see Help.

Click OK to have the selected profile applied, with the settings you specified.

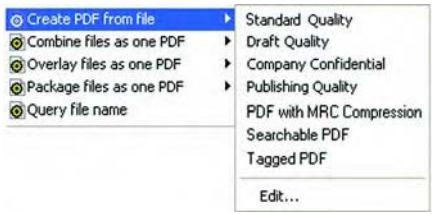
Then press the Create button in the Assistant. The Print Info dialog box appears, listing the input and output files and showing the conversion status. Double-click any PDF name to view the created PDF.

Create PDFs from Windows Explorer

Right click on a single file. The shortcut menu includes:

Choose a profile from the first item's sub menu. The current settings for that profile will be used for the PDF creation. Click Edit... to modify profile settings or create a new one before PDF creation. The second item shows the current saving instruction. Click on it to set a different instruction.

If you select a group of files and right click, the shortcut menu includes:



Choose the first option and then a profile to create one PDF from each selected file. To generate a single PDF, choose to combine, overlay or package the files along with a profile. The last option displays the current saving instruction. Click it to change this.

Create PDFs from Microsoft Word

1. Open the Word document.
2. Select Create PDF from the Nuance PDF menu or click . In Word 2007 or 2010 you can find this in the Nuance PDF tab.
3. Accept or change the default target folder and file name in the Save As dialog box that appears.

4. Optionally, add document information (keywords etc.) or choose **Embed Metadata** (see below).
5. Click to create a PDF and attach a copy of it to an e-mail message.

The Nuance PDF Settings for Word dialog box

This can be accessed from a toolbar button or an item in the Nuance PDF menu. (In Word 2007 you can find this in the Nuance PDF tab.) It lets you define settings that are applicable only when creating a PDF from a Word document. Define which paragraph styles in the Word document should be converted to bookmarks in the PDF, which comments should be transferred, how hyperlinks should appear, and which items should be tagged, if any. Choose **Embed Metadata** to transfer document information (subject, author, keywords...) from the Word document into the PDF. Use the Advanced panel to access the full range of PDF creation settings.

Create PDFs from Microsoft Excel and PowerPoint

1. Open the Excel file or PowerPoint presentation.
2. Select Create PDF from the Nuance PDF menu or click .
3. Accept or change the default target folder and file name in the Save As dialog box that appears.
4. To create a PDF and attach a copy of it to an e-mail, click .
5. To change creation properties, click .
   You can choose whether or not to have comments and hyperlinks transferred to the PDF and bookmarks created. In Excel each worksheet becomes a bookmark and in PowerPoint each slide. Choose **Embed Metadata** to transfer document information from the source document into the PDF.

Create PDFs in mailing applications

A new toolbar is added to Microsoft Outlook and Lotus Notes (versions 7.0 and 8.5).

1. Click to convert the attachments in the current message to PDF and save them to a defined folder.
2. Click to access settings. Choose to have all attachments converted in the background and sent to the last used folder, or to be able to choose which attachments to convert and to change the target folder.
3. Click in the Nuance toolbar in a new message or a reply window to choose one or more files from your computer to be converted to PDF and attached to the message.

NOTE: If you do not see the buttons in Word, Excel or PowerPoint, go to View › Toolbars and select Nuance PDF.

Create PDFs from Internet Explorer

1. Open a web page you want to capture as a PDF.
2. Click the Create PDF button and choose to make a PDF from the web page, or to add its content to an existing PDF, or to create a PDF and attach it to a new empty message in your default e-mail program (Outlook or Lotus Notes).

The button's drop-down list also lets you access creation options. To make a PDF from a web page linked to the current one, right-click on the link and choose **Create PDF file from the content of the link**.

ScanSoft PDF Create! Properties dialog box

This gives you full control over conversions done without using the PDF Create Assistant. In the General panel you define page size, orientation, resolution for the PDF, choose whether or not to view it after creation and choose a grayscale or color PDF. The PDF Settings panel lets you define the PDF version, control font embedding, set compression types and severity, define passwords and add watermarks. It gives you choices for naming the created PDF file(s) and defining properties such as title, author, subject and keywords. The created file(s) can also be directed as attachments to an E-mail message, ready for distribution.

The ScanSoft PDF Create! Properties dialog box can be accessed from the Print dialog box in your applications. When working from the Create Assistant or Windows Explorer, these settings are made through the profiles. If you need to access these settings from Microsoft Word, choose File/Print instead of the Create PDF button.

How to overlay PDF files

Overlay options let you place artwork or other fixed items onto just the first page of your PDF files, together with items that change from file to file. Overlay example for a cover page:

Single-page file with repeated elements + Page 1 of a multi-page document = Cover page of resulting PDF file

To have this result, deselect the option 'Repeat the last page of the shortest document for page overlay'.

You can also use an overlay to add a company logo or other fixed item to every page of PDF files you create. To do this select the option named above. For more information on overlay choices, please consult Help.

How to package files

A package is a single PDF file that contains a set of PDF files. Packages help you group related files, making it easier to send them by e-mail. To package a set of files, maybe of differing file types, select them in the PDF Create Assistant. Choose packaging as the assembly instruction. Click Options to choose which cover page to use: a Create Assistant Template or the first listed file.

Click the Create button to have PDF files created or transmitted into the package.

To open a PDF package you must use a recent PDF viewer or editor, such as Nuance PDF Converter Professional 5 or 6. All files in the package are listed, you can open and save each one separately. With Nuance PDF Converter Professional 4 and older PDF viewers/editors, the files are indicated as attachments.

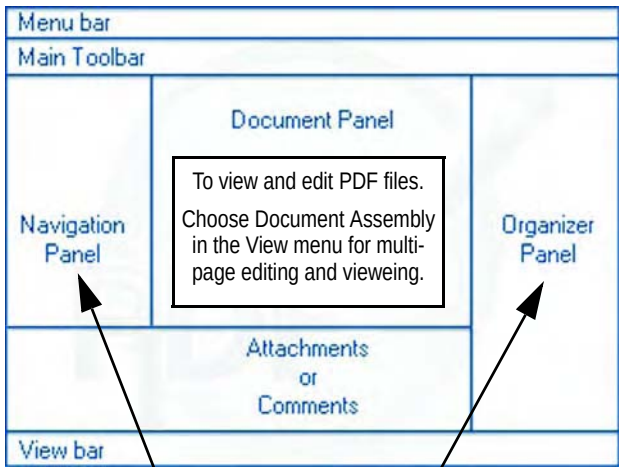
SharePoint and other DMS support

Microsoft SharePoint is supported by PDF Create inside PDF Converter Enterprise 7, through a set of dialog boxes that can be accessed from the Add button menu item Open from DMS. Other Document Management Systems (Hummingbird, Worksite, DocsOPEN, LiveLink) can be accessed directly through their own interfaces. See Help for detail, and System Requirements for the full DMS listing. Created PDF files can be stored in SharePoint or other systems by choosing Save to DMS as target in the Destination Settings dialog box.

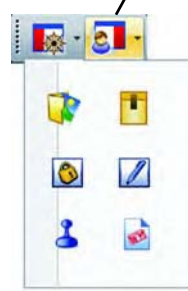
Inside SharePoint, Hummingbird Enterprise and Interwoven Worksite it is possible to choose a non-PDF file, open its shortcut menu to call on PDF Create to make a PDF from it and place it in the same location, with the same file name. It is also possible to select a non-PDF file from the computer's file system and have it converted to PDF and placed in the DMS at the current or a defined location.

Edit PDF Files

The main screen areas of PDF Converter Professional are as shown below:



Navigation panels:
Attachments
Bookmarks
Comments
Destinations
Form Controls
Model tree
Pages
Signatures
Tags



Organizer panels:
Clip Art
Envelope
Security
Sign/Certify
Stamps
Watermarks

PDF Converter Professional groups its controls in several toolbars. You can undock these and drag them into your working area. Here we present the main toolbars, in some cases describing the individual tools from left to right. You can customize toolbars to show or hide buttons.

File toolbar

Use the drop-down list of the PDF Converter tool to unlock the current PDF targeting a selected format and processing mode. For details see the **Export PDF Files** section later in this guide.

This toolbar presents basic operations, such as creating, opening, saving, printing, e-mailing, and searching PDF files; or adding them to your favorites. Scan buttons offer enhanced Scan-to-PDF functionality, including a Scan Inbox in PDF Converter Enterprise 7.

Standard toolbar

Hand: Use this tool for PDF viewing and scrolling. Selection tools let you select pieces of text and document areas.

Select text: Select a text block for editing its properties, exporting, etc.

Select image: Select an image for editing its properties, exporting, etc.

Select area: Select an area for copying or converting its content to an editable format.

Select object: Use this to modify object properties and alignment.

Link: Use this to define a rectangle that will become a hyperlink.

Crop: Draw a rectangle to define the area to remain after cropping; double-click in it to set cropping instructions.

Touch-up text: Make limited text edits, even over multiple lines of text.

Touch-up object: Select objects to move, resize, rotate, group or prioritize them. To modify tag data, select an object, right-click for a shortcut menu and choose Properties/Tag.

Form Tools toolbar

Use this toolbar when working with forms. You can add the displayed form controls to a PDF form. Other tools enable you to highlight or reset form fields and set the tab order.

FormTyper: Use this (the last button on the right) to have form elements detected and automatically activated so you turn a static PDF into a fillable form.

Comments toolbar

Note: Add a note to the PDF; note conversations are possible when PDF files are shared. Sort notes by author, type, date and more.

Text Box: Click this to add a text box above the other content on the PDF page.

Callout: Add customizable callouts to your document.

Text Markup: Use different markup tools on the selected text.

Highlight: Select from the shown highlighting tools.

Attach: Attach a file or a sound file to the PDF with an icon at a specified location.

Drawing: Draw different shapes on the page. Use a shortcut menu to signal 'complete' when drawing multi-sided shapes.

Security toolbar

Security panel: Click this to set passwords and other security measures for the PDF.

Digital Signatures: Sign or certify your document; custom signature schemes and signature time stamping are available.

Mark Redaction: Black out confidential information in your text (available only in the Enterprise version - see below).

Advanced toolbar

Use this toolbar to include movies, sounds, 3D files or Silverlight content in your PDF. You can view and edit 3D files.

Imposition: (right-most button): Prepare the PDF for DTP-style physical printing.

Measure toolbar

Use this toolbar to measure dimensions inside elements in the PDF, whose scale you can define.

Document Assembly

To edit page contents or perform page operations while viewing several pages, activate Document Assembly view in the View menu or by clicking the Document Assembly button at the bottom of your screen. The Document Assembly toolbar lets you insert, extract, delete and renumber pages; split your current document; or work with headers and footers (create, update or remove them). This view shows small-sized pages, not static thumbnails, so comments can be placed and text selections copied to other pages, even in other documents.

The right-most button is new: Page Assembly. It avoids the need to open multiple instances of the program ti insert pages from a set of documents. Each document is displayed in a tab, using page thumbnails. This lets you view documents and drag-and-drop the desired pages into the target document. A wide variety of file types are supported, conversion to PDF takes place when required.

Document Security
To modify the security settings for your document, click Document › Document Properties and choose the Security tab. This will always display your current settings. You can choose to protect your document by passwords or Certificate security at different levels.

Searching and Indexing Documents
You can carry out text searches in the currently open PDF, all PDFs in a given folder or on a pre-built index file. Searches can be done using a single string, multiple search strings, patterns or masks. Use the Organizer to specify the search criteria. A PDF Index file (.zpi) is a searchable archive of PDF documents. Click Document › Indexing to create a new index, modify an existing one or to work with embedded indexes.

Windows Desktop Search
Microsoft offers a Windows Desktop Search facility, to search through files of different types in specified folders. PDF Converter Professional provides WDS with the added benefit of including PDF files in these searches - this includes image-only PDFs.

Reading Text Aloud
Use the command Read PDF in the Tools menu to have the PDF text read aloud. Choose the current, next or previous paragraph or page or the whole remaining document. Choose Properties to set the rate and volume. You can also save the PDF text to a sound file in the wav format. This facility is powered by the Nuance RealSpeak Solo Text-to-Speech engine.

PDF Optimizer
Optimize your PDF to best fit its purpose. Click Tools › Optimize PDF and specify target requirements such as fast web view, object and image compression, scanned page settings, font embedding and more. You can also add tags to PDF files, to have their logical structure (paragraphs, titles, pictures, tables, cells, etc.) identified and logged.

PDF Printing

In addition to the usual print choices you can choose to print the PDF with or without comments. You can also print form fields only, allowing you to print an empty form, fill it electronically, and then print your responses onto the empty form. The Imposition tools lets you to prepare PDF pages for physical printing.

Table of Contents

Insert a Table of Contents in your document, based on bookmarks. Open the bookmark panel, set bookmarks and their ranking, then choose Table of Contents from the bookmark panel's shortcut menu. The TOC is useful when the PDF is physically printed and bookmarks are no longer available.

PDF Document comparison

This lets you compare two PDF files with similar content - typically an earlier and later version of one document. Access this from the Document menu, then choose to see a visual or a textual comparison, with a side-by-side or combined presentation. The latter shows only one document and marks object or text changes: new text is underlined while deleted text appears in a marker tooltip.

PDF to Word Document comparison

PDF Professional is able to compare a PDF file with a particular version of a Word file; typically this will be the file the PDF was made from. It can show which changes were made since the PDF was created. The comparison is made within Word, the result can be displayed in a temporary file that you can save if required.

PDF splitting

You can split large PDF files into a set of smaller ones so they are easier to distribute. Access this from the Document menu and choose splitting criteria: by file size, blank pages, number of pages, bookmarks, document structure, etc. You can also extract pages by criteria that you specify.

PDF portfolios

Portfolios let you collect a set of documents relating to a particular topic for convenient distribution. PDF Professional provides this by extending the previous PDF Create support for packages. A portfolio is superior to a package because it can contain documents of differing file types (all documents in a package must be PDF files) as well as folders and folder structures. Support for displaying non-PDF pages is added.

Package PDF files

PDF Create lets you select a set of files and have their copies grouped in a single PDF package file. Any non-PDF files you select enter the package as PDF files. To include non-PDF files in a package in their original format, open a package, open a PDF inside it, and attach these files. You can add a cover page to the package. Help explains how different PDF programs let you use and unpack received packages.

Place files in an Envelope

This is similar to packaging files, but in this case the files become attachments to the enclosing PDF and keep their original file types. An envelope file acts as a cover page.

Archive E-mail

PDF Professional lets you archive selected e-mails and e-mail folders. You can choose to create a single PDF from each message, merge all selected archive items into one PDF (each message will be bookmarked inside it), or package the selected items. Message attachments keep their original file types.

Batch processing

This lets you build a series of commands and their settings into a named and stored sequence, letting you efficiently apply pre-defined processing to groups of PDF files repeatedly, by just running a sequence. Input and output file names and locations can be predefined or enquired run-time and output can be to non-PDF file types. It is also possible to run a batch processing sequence on all PDF files currently open in PDF Professional. In that case the output is always PDF and it replaces the input files inside the program.

Other new features

Support is introduced for PDF layers; this is useful in working with archtectural plans and in preparing PDF files for delivery to printing houses. Document flattening allows annotations to be removed or converted to document objects. Integration of the program in internet browsers is expanded to Google Chrome and Apple Safari.

The following features are provided only in the Enterprise edition, along with Enterprise documentation for network administrators:

Legal Support

Legal stamps are available, along with Bates stamping and CaseMap support for legal offices. Choose Inspect Document in the Document menu to select items to be removed from a file, such as comments, bookmarks, hidden text, embedded indexes or sensitive metadata like the author's name or the file history.

SharePoint and DMS support

The program supports the following Document Management Systems: Micorsoft SharePoint, Interwoven WorkSite, Hummingbird Enterprise, Hummingbird DocsOpen and LiveLink. See System Requirements in Help. The ability to create PDF files from or inside DM Systems is documented at the end the PDF Create section of this guide. The ability to unlock PDF or XPS files is similarly documented at the end the PDF Converter section. A menu item and a toolbar are added to PDF Professional for each detected DM system, allowing you to open PDF files from the DMS, save PDF files to DMS, access the DMS document properties, extract or instert pages to or from the DMS or select a file of any type from the DMS to have it attached to the current PDF document. Commands from PDF Professional are also available inside SharePoint, Hummingbird Enterprise and Interwoven Worksite.

Redaction

Document text confidentiality is achieved by redaction - the blacking out of pieces of text or images. Select text or images to be marked for redaction with the Redact tool in the Document menu or the Security toolbar. This menu also allows marking for redaction by searching. The program finds all occurrences of a given text string in the document, letting you review them and choose which will be marked for redaction. Use the Apply redaction menu item or button to have all marked items (whether resulting from searches or selection) blacked out permanently. When a redacted document is saved, the program always offers Save As, because you should save the redacted file to a new name. The original file remains with the redacted items marked but still readable.

Warnings:

- Be aware that once a file is saved with redacted items, there is no way of restoring the removed content – it can neither be viewed nor found by searching.
- If text to be redacted contains typing errors, maybe some sensitive data will not be removed by searching. We suggest that you always check a search-redacted document manually before releasing it.

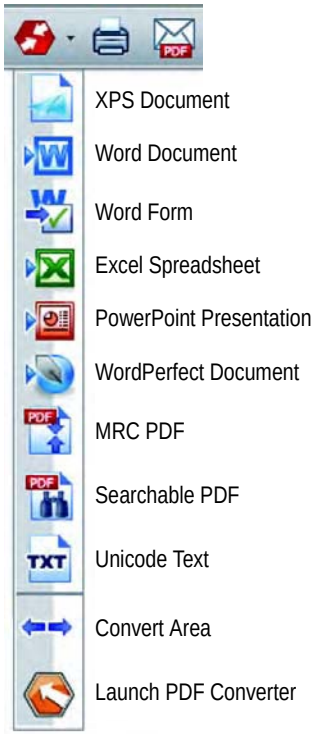
Export PDF Files

Starting the Program

To make the services of PDF Converter easy to call on, it can be started from several locations, as described in the following overview table and procedures.

Location	Source PDF/XPS	Conversion method	Target
PDF Professional File/ Save As menu or button or Tools/Launch PDF Converter	Current PDF in PDF Professional	Converter Assistant or Direct Conversion with chosen mode and target	User defined
Windows Start Menu	Local or DMS files	Converter Assistant	User defined
Microsoft Word (Open PDF/XPS button)	One local file	Converter Assistant	Microsoft Word
Microsoft Word (File Open)	Local files	Converter Assistant Direct Conversion	Microsoft Word Microsoft Word
Corel WordPerfect	One local file	Converter Assistant	WordPerfect
Microsoft Excel	One local file	Converter Assistant	Excel
Microsoft PowerPoint 2007	One local file	Converter Assistant	PowerPoint 2007
Windows Explorer	One local file	Converter Assistant Direct Conversion	User defined As last set
Microsoft Outlook	One or more mail attachments	Converter Assistant Direct Conversion	User defined As last set
Lotus Notes	One or more mail attachments	Converter Assistant Direct Conversion	User defined As last set
Microsoft Internet Explorer	One web link	Converter Assistant	User defined
Mozilla FireFox	One web link	Converter Assistant	User defined

Exporting PDF from the Professional program



The component that lets you export the content of PDF files to editable formats is called PDF Converter. Access it from the Convert PDF button in the File toolbar. Choose a direct conversion to be performed with current settings for the selected mode or choose the last item to open the PDF Converter Assistant for full control.

You can also perform direct conversions by selecting the Save As command from the File menu. You can extract and save only text from the document or save the file as image.

With the Convert Area tool, you can use the Select Area tool to define an area of interest in a page for PDF Professional to convert its content to an editable format. This lets you, for instance, select a table and send it to Excel without the rest of the page or select the precise content to become a single PowerPoint slide.

Conversion between PDF and XPS file formats is also supported.

The PDF Converter Assistant

Start this from the Windows Start Menu. The Assistant lets you prepare and control conversions. Its Full view shows you a preview of PDF and XPS files to be converted and lets you set page ranges. The panel on the right lists all files selected for conversion; icons show loading or conversion status. Help explains the meanings of the icons.

PDF Converter offers four levels of control:

Quick View:

This allows quick conversions using current settings for everything beyond four basic choices.

Full View:

This presents the same four buttons from Quick View, but also displays page previews and offers all settings that influence the conversions. Choose a mode to see its settings. Choose a target (or click the Output tool when there is no choice) to set saving options. Full view lists all files in the current conversion session along with status information for each of them.

Left View:

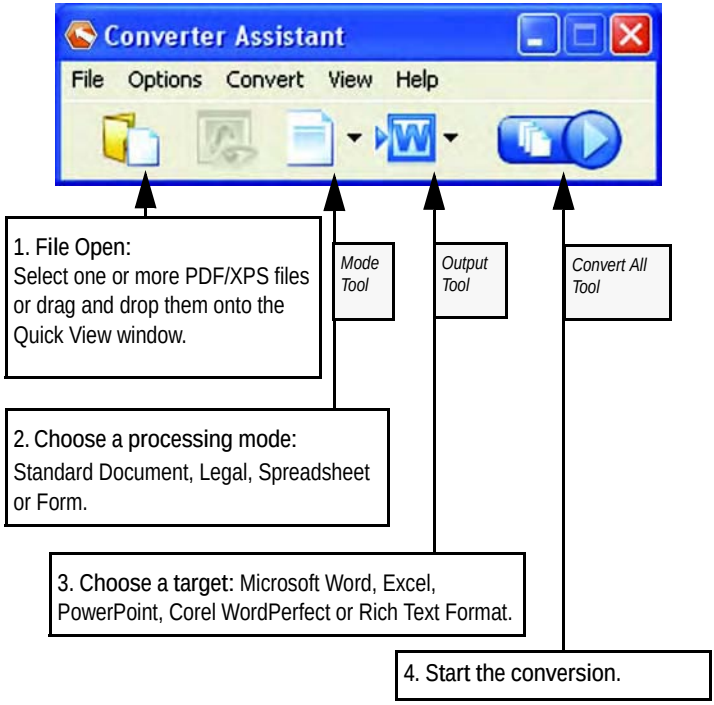
This appears when PDF Converter is called from inside a target application. Then only a single file can be converted, so just the left preview panel and its controls are needed. Click a button or use the View menu to change the contents of the left panel.

No Assistant:

From starting places where the input file and target are pre-defined, you can by-pass the Assistant altogether and perform a direct conversion using existing settings. See *Starting the Program from other places*.

Converting with Quick View

Choose **Quick View** in the View menu. Then your conversions are an easy 4-step process, using current settings for everything else:

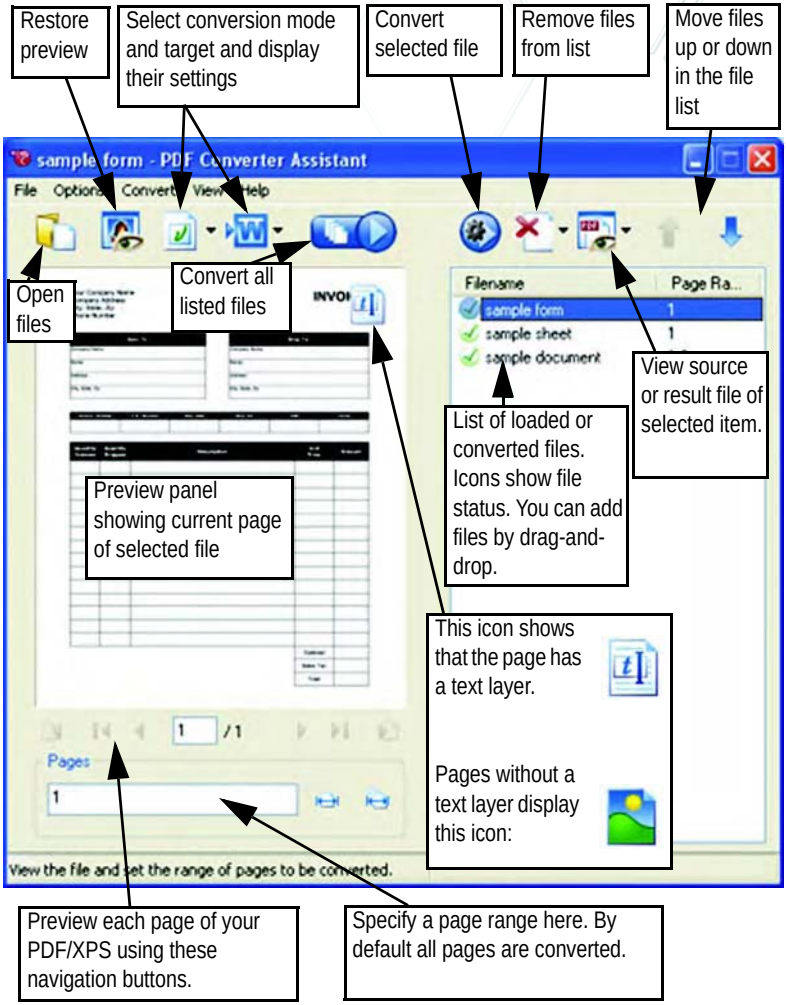

Converter Assistant
File Options Convert View Help
1. File Open:
Select one or more PDF/XPS files or drag and drop them onto the Quick View window.
Mode Tool
Output Tool
Convert All Tool
2. Choose a processing mode:
Standard Document, Legal, Spreadsheet or Form.
3. Choose a target: Microsoft Word, Excel, PowerPoint, Corel WordPerfect or Rich Text Format.
4. Start the conversion.

During conversion, the buttons are grayed. If **View Result** in the Output Options panel is selected, the converted file appears in its target program.

Turn off the Quick View toggle in the View menu to return to Full view to see the processing summary, inspect and change settings or view page previews. If you close the program with Quick View active, it will reappear when the program is next started.

Converting with Full View

Here is the Assistant in Full View. Three sample files are loaded, the sample form is displayed in the Preview panel on the left.


Restore preview
Select conversion mode and target and display their settings
Convert selected file
Remove files from list
Move files up or down in the file list
sample form - PDF Converter Assistant
File Options Convert View Help
Open files
Convert all listed files
Filename
Page Ra...
sample form
sample sheet
sample document
View source or result file of selected item.
List of loaded or converted files. Icons show file status. You can add files by drag-and-drop.
Preview panel showing current page of selected file
This icon shows that the page has a text layer.
Pages without a text layer display this icon:
/ 1
Pages
View the file and set the range of pages to be converted.
Preview each page of your PDF/XPS using these navigation buttons.
Specify a page range here. By default all pages are converted.

Starting the Program from other places

To make the services of PDF Converter easy to call on, it can be started from several locations, as described in the following procedures:

The Windows Start Menu

Choose PDF Converter Assistant from the Nuance PDF Professional 6 group in Programs or All Programs. All conversions started from the Start menu use the PDF Converter Assistant. It allows you to name input PDF or XPS files from your local computer or a Document Management System and decide how to handle output files. Display of the created file is optional.

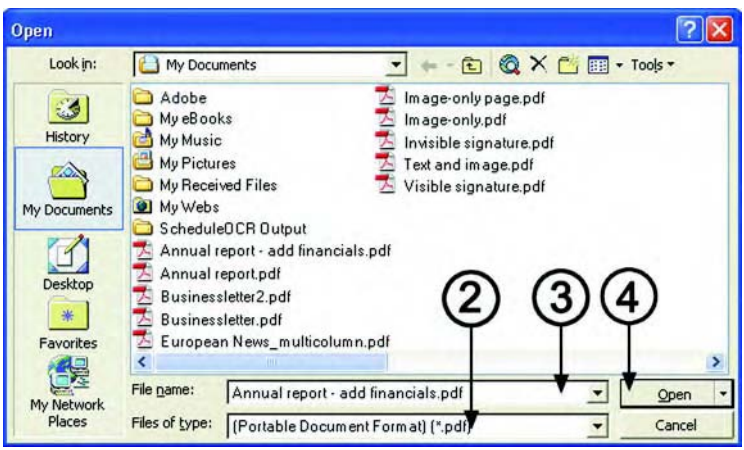
The Open PDF/XPS button in a Microsoft Word Toolbar

1. Use the Open PDF/XPS button in a Microsoft Word toolbar or the **Open PDF/XPS...** item in the Word File menu to call an Open dialog box with PDF selected as file type. In Word 2007 go to the Nuance PDF tab, or access the File menu via the Office button.
2. Choose a single PDF or XPS file, browsing if necessary. Click Open.
3. The Converter Assistant preview panel displays the first page of the input file. View other pages and set a page range if desired.
4. Select the processing mode with the Mode tool or from the Options Menu. This calls the settings panel for the chosen mode. Make settings as desired.
5. Click the Output tool or select Word Document (the only possible target) in the Options menu to select saving options including whether to save to Office 2007 or to earlier versions.
6. Press to start conversion, with a progress monitor. The resulting file is displayed in Microsoft Word ready for editing.

Note: In Office versions before 2007, if you do not see the Open PDF/XPS button in a toolbar, go to View › Toolbars and select **Nuance PDF**, or open the Preferences dialog box of the PDF Converter Assistant to enable Microsoft Word integration and restart Word.

The Open Dialog Box in Microsoft Word

1. Click Word's File Open button or go to the Microsoft Word File menu and click Open...
2. Select PDF (Portable Document Format) (*.pdf) or XPS in the Files of type box.
3. Select the PDF or XPS file you want to convert. Multiple selection is possible; then files are converted one after the other.
4. Click Open. (The picture shows steps 2, 3 and 4.)



5. Conversion starts with or without the Converter Assistant, as specified in the PDF Converter 7.0 Settings dialog box, found in Word's Tools menu. In Word 2007 and 2010, the PDF Settings button in the Nuance PDF tab displays the dialog box.
6. If the PDF Converter Assistant is enabled, the PDF/XPS is previewed and you can change mode settings before starting the conversion. If the PDF Converter Assistant is disabled, conversion

starts immediately, using the existing settings for the pre-defined mode.

7. Converted, editable documents are displayed in Microsoft Word.

8. A converted document will display as if it were still the PDF or XPS file. You must save it as a Word document with the command **Save As...**. If you use **Save** or **Close** without saving, you will lose either the converted document or the original file. The program warns you of this:

Nuance PDF Converter
The Nuance PDF Converter has successfully converted your PDF file into Microsoft Word format.
OK
Please use "Save As..." rather than "Save" to avoid overwriting the original PDF file.
Please do not show me this again

WordPerfect

Use the **Open PDF/XPS** item in the File menu of WordPerfect. Select a single PDF file and click Open. View pages in the PDF Converter Assistant in Left view. Set a page range if desired. Select a mode (standard or legal document) and its settings. Set output settings. Click the Convert All button. The resulting file is displayed in WordPerfect, ready for editing.

Microsoft Excel

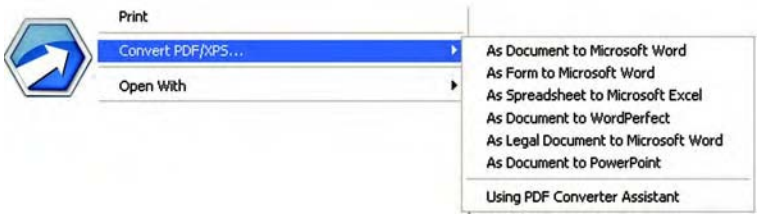
Use the **Open PDF/XPS** button in a Microsoft Excel toolbar or the Open PDF/XPS item in the File menu. For Excel 2007 or 2010, see above under Word 2007. Select a PDF or XPS file and click Open. View the PDF in the PDF Converter Assistant left view. Set a page range if desired. Click the Spreadsheet button (the only possible mode) to set conversion options, (including one worksheet per table or per page). Set output settings. Click the Convert All button. The resulting file is displayed in Microsoft Excel ready for editing.

Microsoft PowerPoint 2007 or 2010

Use the Open PDF/XPS button in the Nuance ribbon. Select a single PDF or XPS file with content suitable for a slide presentation and click Open. Select settings and a page range if desired. Click the Convert All button; the converted file appears in PowerPoint 2007 or 2010. To view it in older PowerPoint versions you will need a Microsoft Office compatibility pack.

Windows Explorer

1. Right-click on a PDF or XPS icon or file name in Windows Explorer or a PDF or XPS icon on your desktop.
2. Choose a conversion mode and target from the shortcut menu. If you choose to use the Assistant, you make these choices in its Preview panel.



Microsoft Outlook

1. Click the Settings button in the Nuance PDF for Outlook toolbar or the equivalent item in the Nuance PDF menu. Choose to use the Converter Assistant or perform a direct conversion to a target you choose. Specify whether all PDF/XPS attachments should be converted, or request a file list so you can select which files to convert. These settings apply to all conversions until changed.
2. Select a message with one or more PDF or XPS file attachments.
3. Click the PDF Converter button PDF Converter 7.0 in the Outlook toolbar or in the message toolbar. In Outlook 2007, use the Nuance PDF tab in the message window.

4. If you requested prompting, select which attachments to convert in the **Attached files list** dialog box. Click **OK**.
5. PDF Converter Assistant appears if you requested this. Preview pages, specify a page range if desired, adjust settings including the saving instructions and click Convert All. If you requested a direct conversion, a progress monitor appears and the file is saved to the predefined location with the same name as the source file.

The procedure is the same in Lotus Notes (v. 7.0 or 8.5).

Microsoft Internet Explorer and Mozilla Firefox

1. Right-click on a hyperlink leading to a PDF or XPS file.
2. Choose **Open with Nuance PDF Converter 7.0**.
3. The Assistant downloads and converts the file.

Processing modes and outputs

Choose from four processing modes, depending on the content of the PDF/XPS file to be converted and the type of output you want. Here are your choices:

Mode	Output
Standard Document	Word Word 2007 PowerPoint 2007 WordPerfect RTF
Legal Document	Word Word 2007 WordPerfect RTF

Mode	Output
Spreadsheet	Excel Excel 2007
Forms	Word Word 2007 RTF

The settings for each mode are displayed on the left panel of the Assistant when you make a mode selection. The values are stored separately for each mode - this includes the image-only processing and graphic handling options that are common to all modes.

The output settings are displayed in the left panel when you make an output selection. The settings are the same for all targets and only one set of values is stored for use with all saving.

Create Word or Excel 2007 output files by selecting the checkbox 'Generate Office 2007 output' in the appropriate output panel. PowerPoint output is always for Office 2007; a downloadable plug-in from Microsoft extends this to Office 2003. See Help.

Next we summarize the choices unique to each mode.

Standard Document conversions

Choose how the layout should be maintained:

- True Page® places all elements in text boxes or frames.
- Flowing Column uses text boxes and frames only when necessary, allowing body text to flow from one column to another.

Legal conversions

Choose to retain or drop legal-specific features:

- Pleading numbers - these typically appear in left margins to define line numbers.
- Images - these are typically stamps, seals, signatures or company logos.

Spreadsheet conversions

This mode can be used for PDF files containing partly or mainly tables. Choose what should be placed in each Excel Worksheet:

- **Per Page:** Each page from the PDF will enter a separate worksheet. This will happen even if page content is not tabular; you can specify a page range to exclude unneeded pages.
- **Per Table:** Each detected table is converted and placed in a separate worksheet. All content not detected as a table is placed in a separate worksheet at the end. The detected tables do not appear here, but are replaced by hyperlinks leading to the relevant worksheet table.
- **Per Document:** All content destined for a single output document will be transferred to a single sheet. This is useful for handling tables which extend over several pages.

When you do Standard Document conversions, tables in the PDF become tables in the output file.

Form conversions

This uses Logical Form Recognition™ technology to detect form elements and convert them correctly. Choose from:

- **No form controls:** The result will be a fillable form with static form elements. You can use form handling tools in the target application to modify the form design.
- **Create form controls:** The result will be a fillable and editable form. You can change field labels and modify the form design.

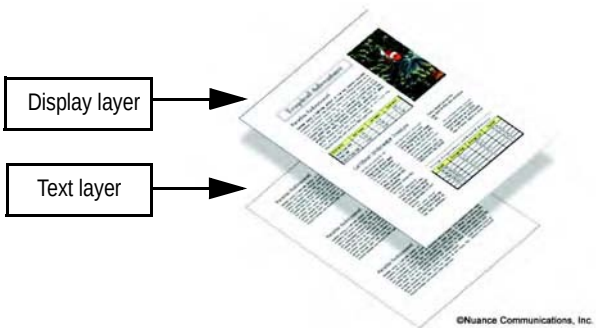
Handling Mixed Input Files

Files often have mixed content: flowing text, tables and forms. In many cases you can process these files with the setting Standard Document and receive good results. For more precise control, your can use page ranges to separate forms and tables and convert them separately. For example, to best unlock a file with two pages of illustrated text, followed by a one-page table you want to do calculations on, and finally a three-page form - convert pages 1 and 2 as Standard Document, page 3 as Spreadsheet and pages 4-6 as Form.

How do PDF files work?

PDF files display texts correctly wherever they are viewed because they carry their typographic information with them. Fonts in the document are embedded in the PDF file and are used after distribution to reconstruct the document. The display does not depend on the needed font files being available on the viewing machine, nor on the language of its operating system.

PDF documents present their pages as images. They can be marked-up and commented, but the ability to change the basic text is limited. Most PDF files can be searched, because the file has two layers. There is an image layer that is presented on-screen. Behind that there is usually a text layer that can be matched to the characters displayed on the screen.



When the starting point for a PDF file is a set of images, or a scanning process, this text layer is not present and the result is an image-only PDF. When the starting point is an editable document, the text layer can be created and the PDF is called 'Normal' or 'Searchable'. The creator of a PDF can require provision of a password to allow access the text layer.

How does PDF Converter work?

PDF Converter has the ability to perform Optical Character Recognition (OCR). This is the process of extracting text from an image. It does not need to use OCR to unlock PDF or XPS files with an accessible text layer - it must capture the page layout and arrange the given text and other elements correctly on each page in the new document.

Optical Character Recognition (OCR) is normally used only for input pages without an accessible text layer or when non-standard character encoding is detected, but you can require it for any conversion under Processing Options in the Converter Assistant.

Handling Image-only Pages

Pages without a text layer are a special case for conversion. You can decide how the program should handle these pages: convert them with the built-in Optical Character Recognition (OCR), transfer them as images to the target document or skip them. You can require inspection of the first pages (up to ten) in files you open. Optionally, you can set conversion to be stopped, if no text-layer pages are detected.

If you have Nuance® OmniPage®, you can use this to have more control over the recognition process.

Language Support

PDF Converter supports over 100 languages, including Danish, Dutch, English, Finnish, French, German, Italian, Norwegian, Polish, Portuguese, Spanish and Swedish. The program can convert multi-lingual documents. A full list of supported languages is provided in Help. Correct language choice is important for converting image-only

pages and handling non-standard encoding. A new choice is Auto-detect which is designed for unattended processing where input image-only PDFs might be in different languages. This examines each PDF and assigns a language to it, choosing from the 22 languages with dictionary support.

SharePoint and other DMS support

The is available for the program when it is supplied as part of PDF Converter Enterprise 7. PDF or XPS files can be opened from Microsoft SharePoint through a set of dialog boxes incorporated in PDF Converter, accessed from the File menu item **Open from SharePoint**. Other detected Document Management Systems (Hummingbird, Worksite, DocsOPEN, LiveLink) also have a menu item; they can be accessed directly through their own interfaces. See Help for detail. Converted files can be stored in SharePoint or other systems with the Store in Document Management System section in the Output Options panel.

Inside SharePoint, Hummingbird Enterprise and Interwoven Worksite it is possible to choose a single PDF or an XPS file, call the Converter Assistant to have it converted and directed to a location on the local computer, or returned to the DMS.

XPS File Support

The support for XPS files provided by the members of the PDF product family is as follows:

	Professional	Create	Converter
XPS to PDF	Yes	Yes	No
PDF to XPS	Yes	No	No
Unlock XPS (XPS to Word, etc.)	Yes	No	Yes

These last two topics relate to PDF Converter Professional.

Web Updates

Select **Automatic Web Updates** under the Help menu to be informed whenever a program update is available for any of the three components. You can also get the latest program updates directly from the Help menu. Please ensure that web access is available.

Un-installation

1. Select **Add/Remove Programs** from the Control Panel. Under Vista, select **Programs and Features** from the Control Panel.
2. Select **Nuance PDF Professional 7.0**.
3. Click **Remove** to uninstall the program or **Change** to auto-repair it.

This removes all three components of PDF Converter Professional.

A de-activation step is performed at the start of uninstallation, allowing you to reinstall the program later without re-activation problems. De-activation requires web access.

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